Mobile Construction Punchlist

Version 2.0

User Guide

Contents

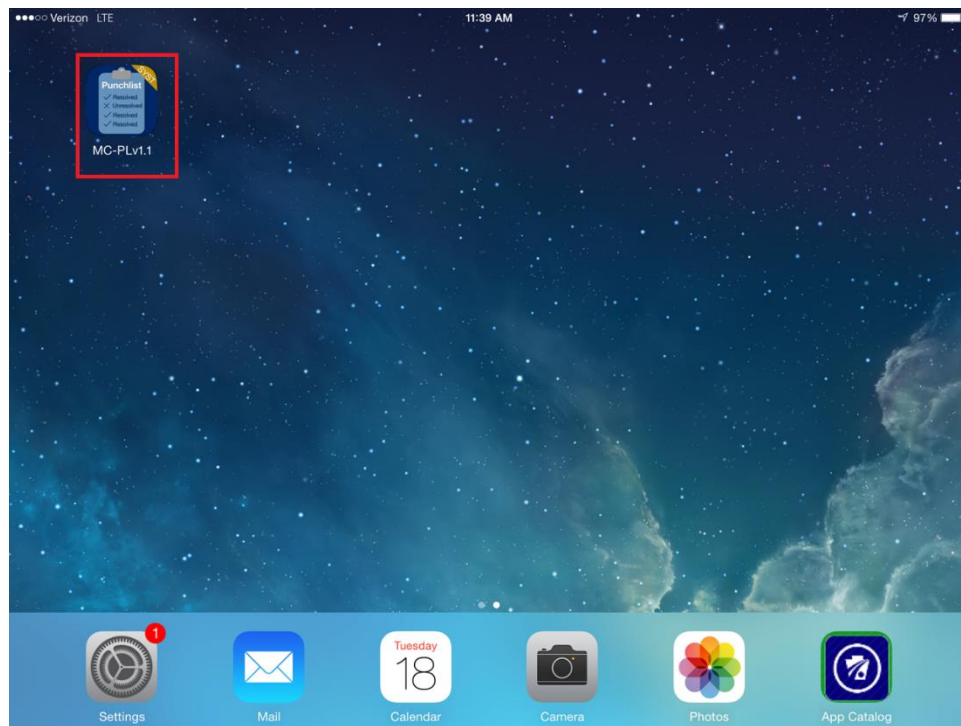## Launching the MC Punchlist App

To launch the MC Punchlist app after you have installed it, click the MC Punchlist app icon on your home screen.

Log In/Log Out

Log In

After you launch the MC Punchlist app, you will be presented with a log in screen. To access the MC Punchlist app, Tap on **Login** and then tap Continue on the pop-up box that appears after tapping on Login.

Tap **Continue** on the pop-up box that appears after tapping on Login
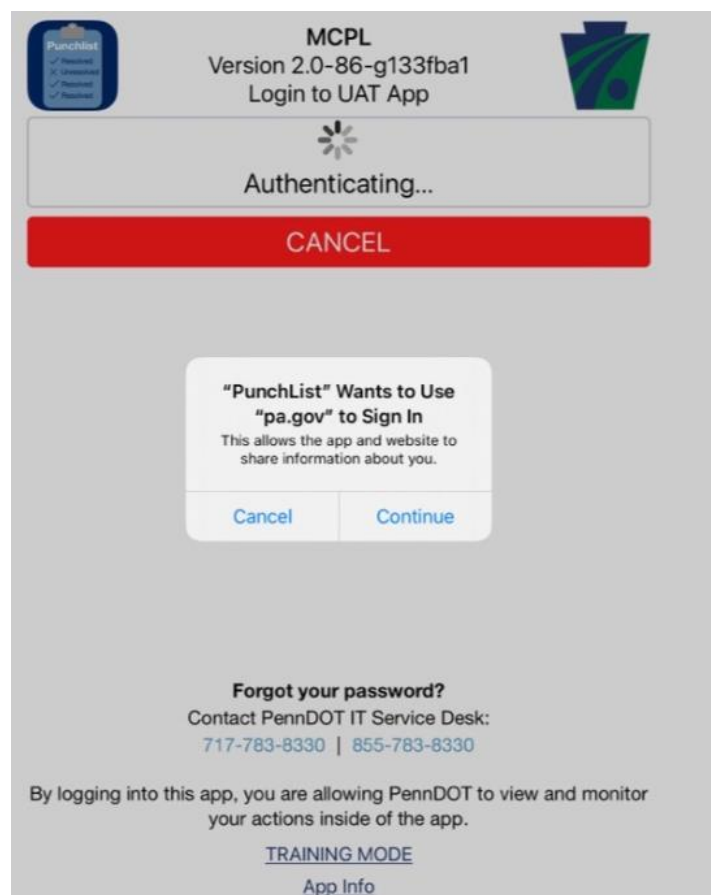
Then, enter your CWOPA username and Password can tap the "Forgot Password" button for assistance options.

Log Out

To log out of the MC Punchlist app, click the "Log Out" button in the upper right hand corner of the screen.
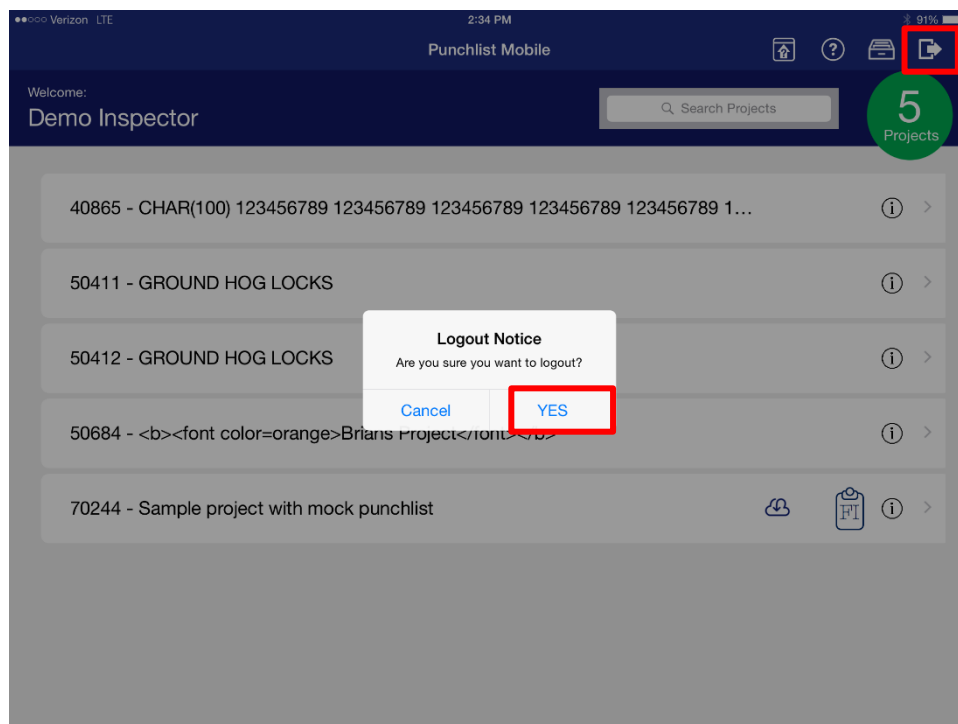
On the pop up that is displayed, click "YES" to be logged out of the app.

Settings

Settings Icon on the dashboard helps top set and or change 'Offline Pin for the Device'. It also displays ECMS User ID that the app is linked to
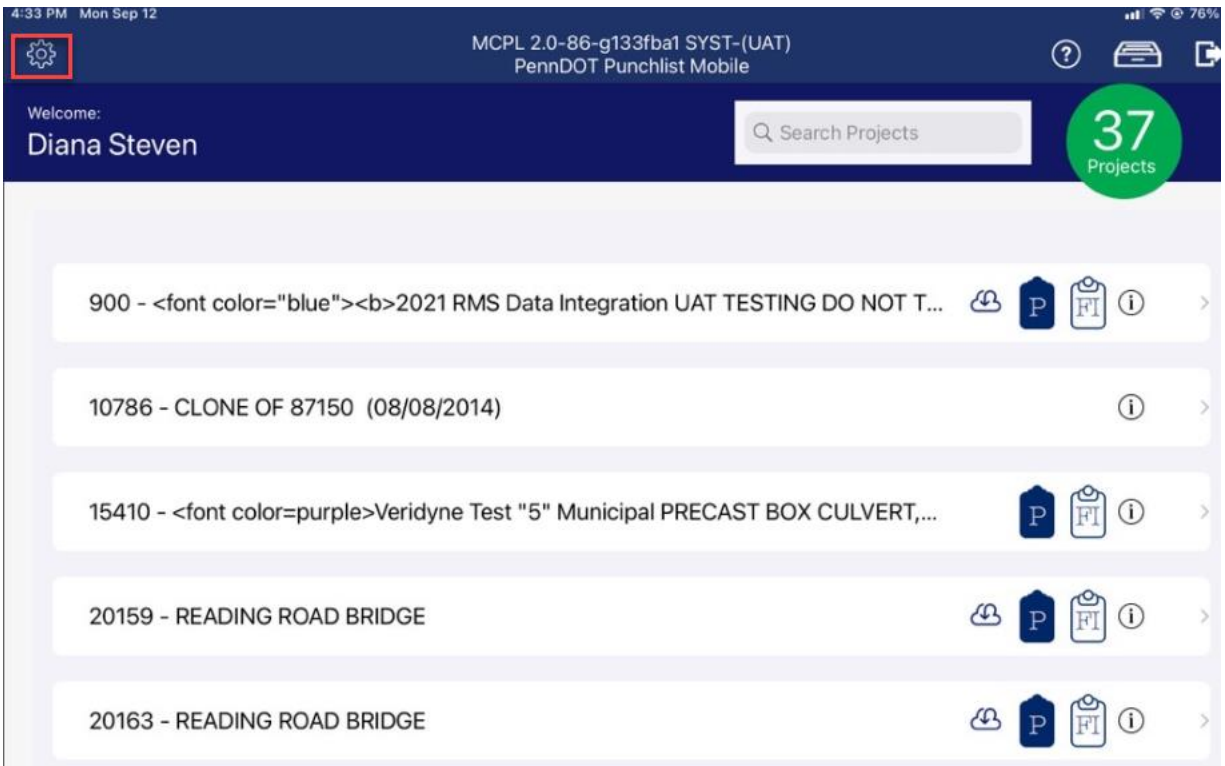
After Tapping on the Settings Icon, users will see the option to 'Offline Pin for the Device' and also notice the ECMS User ID that the MCPL app is linked to.
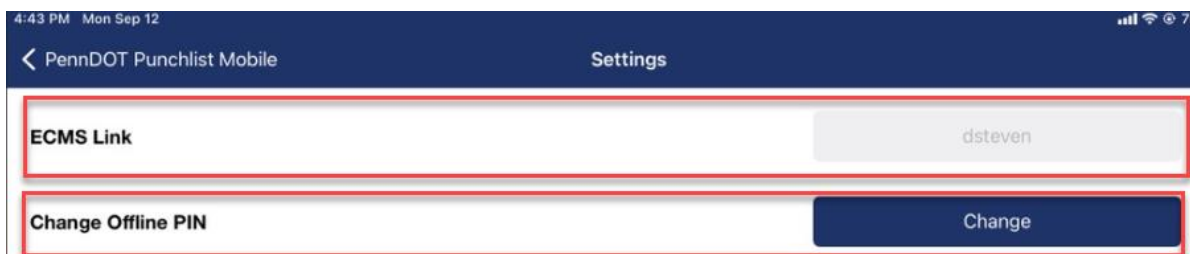
Offline Pin for the Device must be a 4-digit pin, once this is set; Device will prompt the user to enter this Pin to login to the App when the device is Offline (not connected to WIFI/Cellular Data):
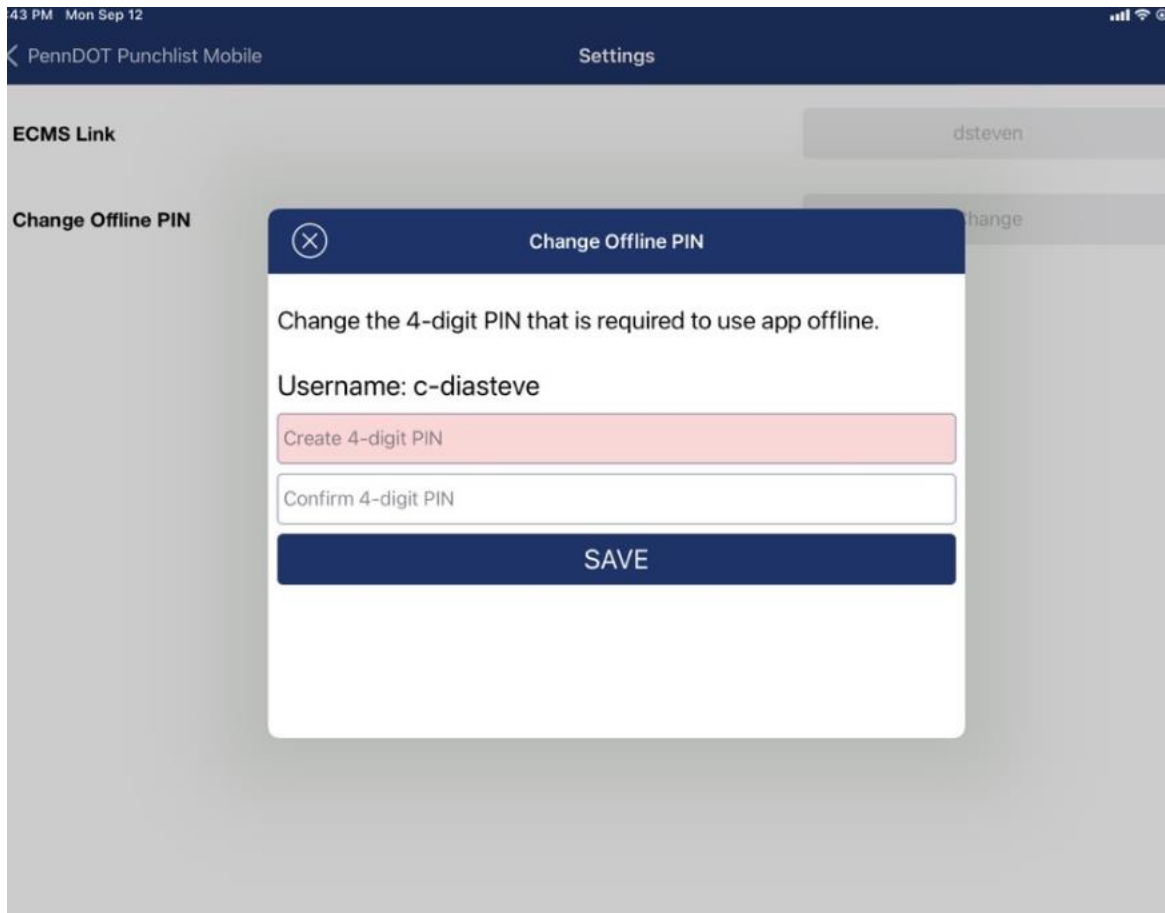
Help

Help Documents and Contact Information
The help function is available throughout the MC Punchlist app by clicking the question mark button in the upper right hand corner.
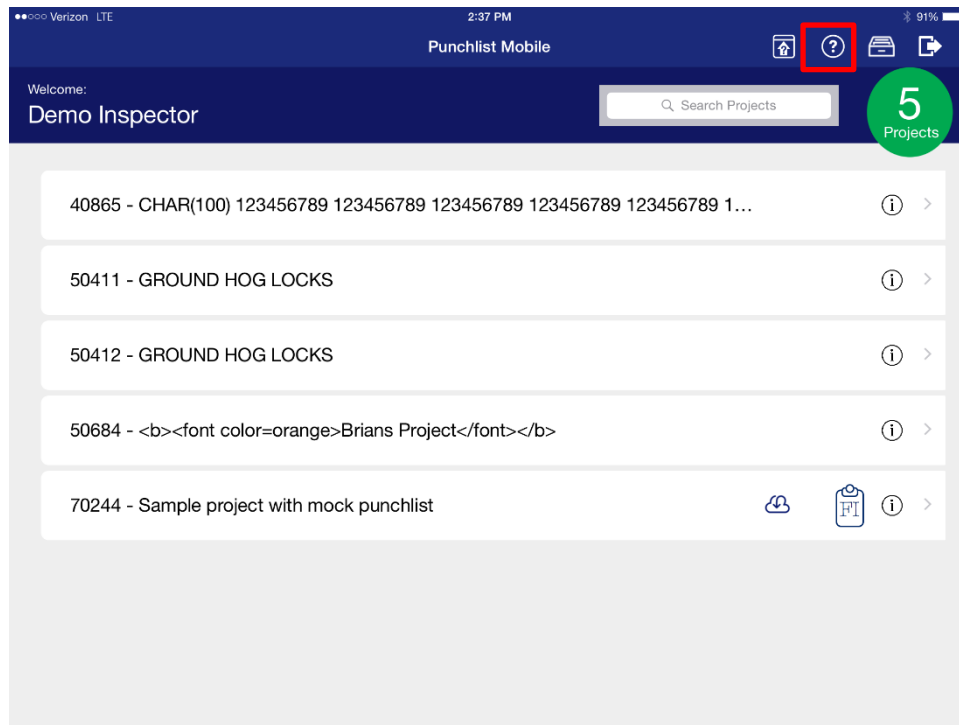
Once clicked, help documents and contact information are displayed.

Contextual Help

Throughout the app, contextual help is available which provides detailed information about the data and icons on the screen you are currently viewing.

Data Status

Throughout the app, icons are used to represent the status of data in the app. These icons and their meanings are outlined below:

✅	Already synced to server	📝	Edited, needs to be synced to server
⚠️	Validation Errors	🔄	Sync errors

Project List Screen
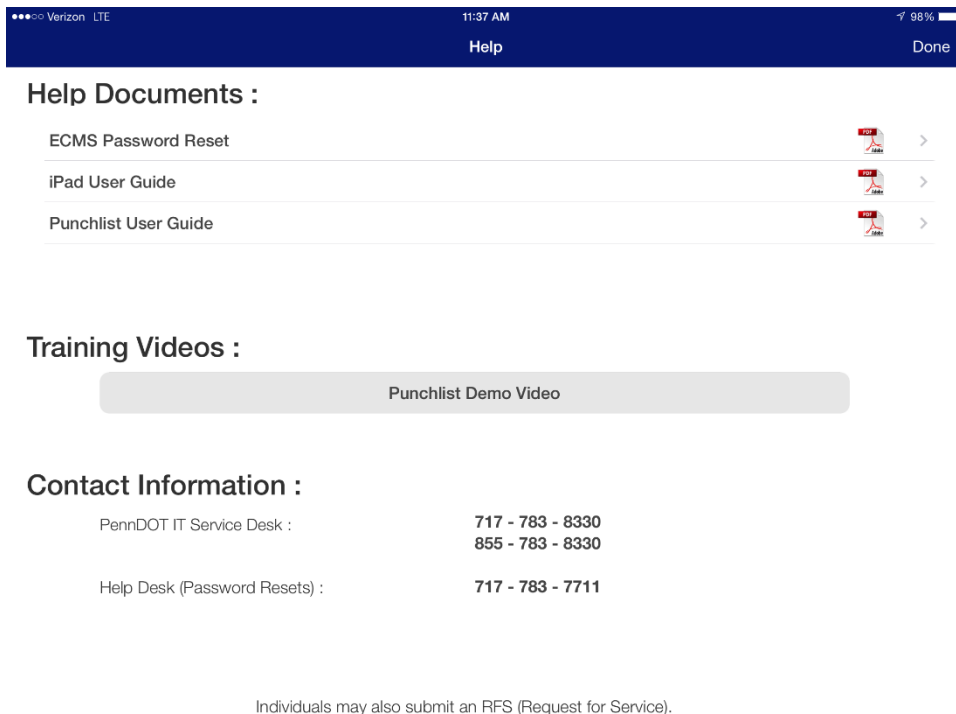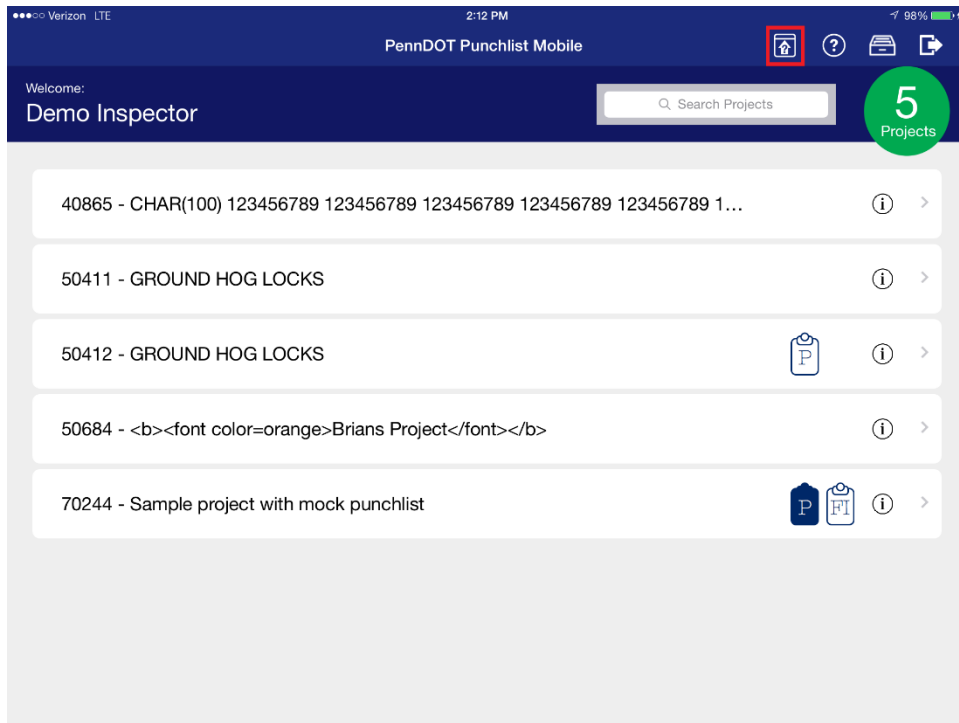
Upon log in, you will be taken to the Project List screen. On this screen, you can view all projects to which you have access in ECMS. Each project lists the ECMS number and Project name.
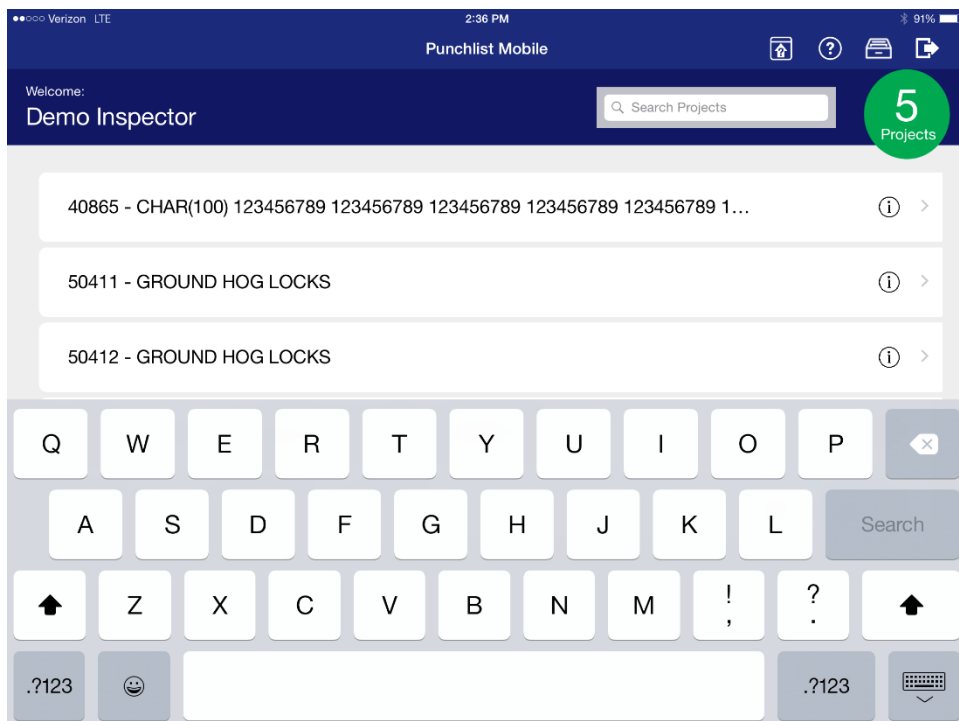
Additional Project Information

In addition to the ECMS Number and Project name, tap the info icon to view the Prime Contractor, SR/Section, District, County and Short Description for the project.
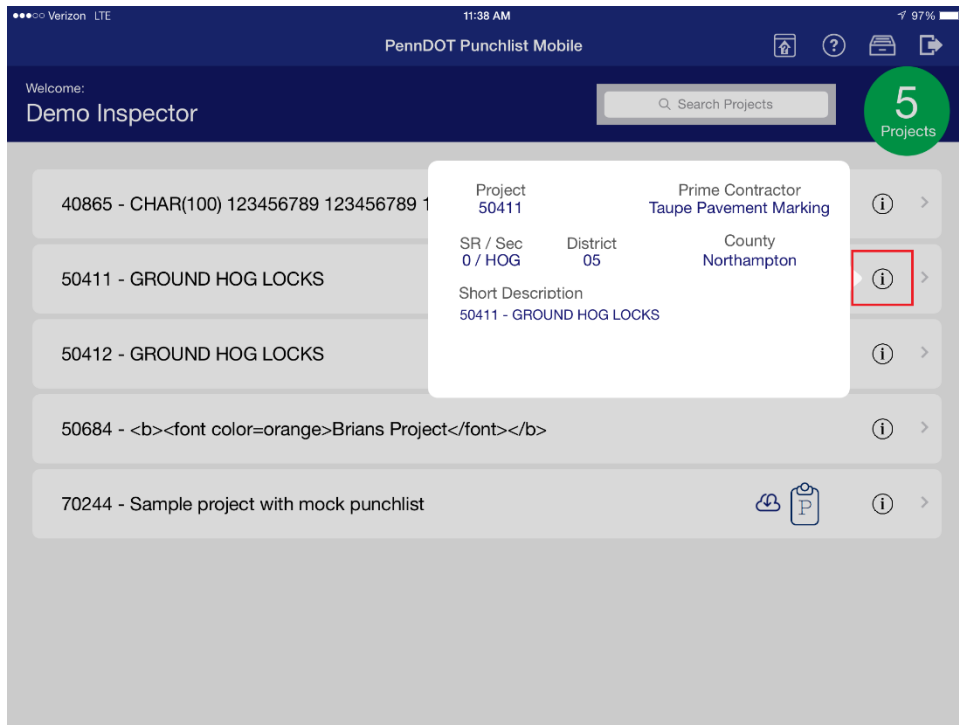
Searching Projects

The Project List Screen includes a search function for quickly filtering your list of projects if it becomes large. Searched project information includes the ECMS number, Name, State Route and Section.

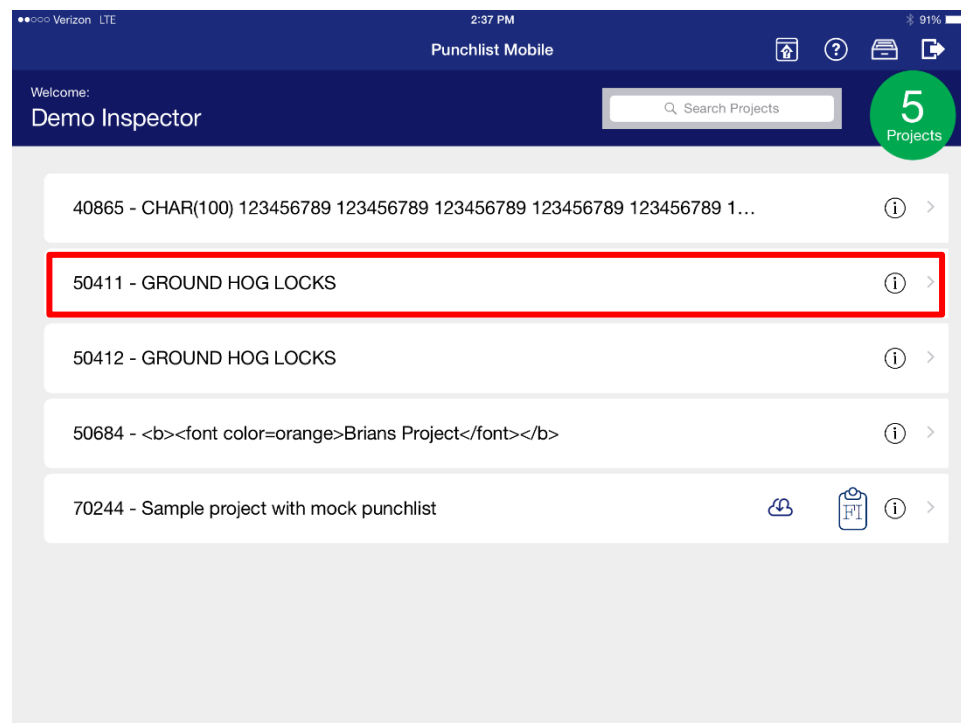To perform a search, tap in the search box to bring up the keyboard.

Then, simply begin typing characters present in your desired project. The list will adjust dynamically to quickly cull the list of projects.
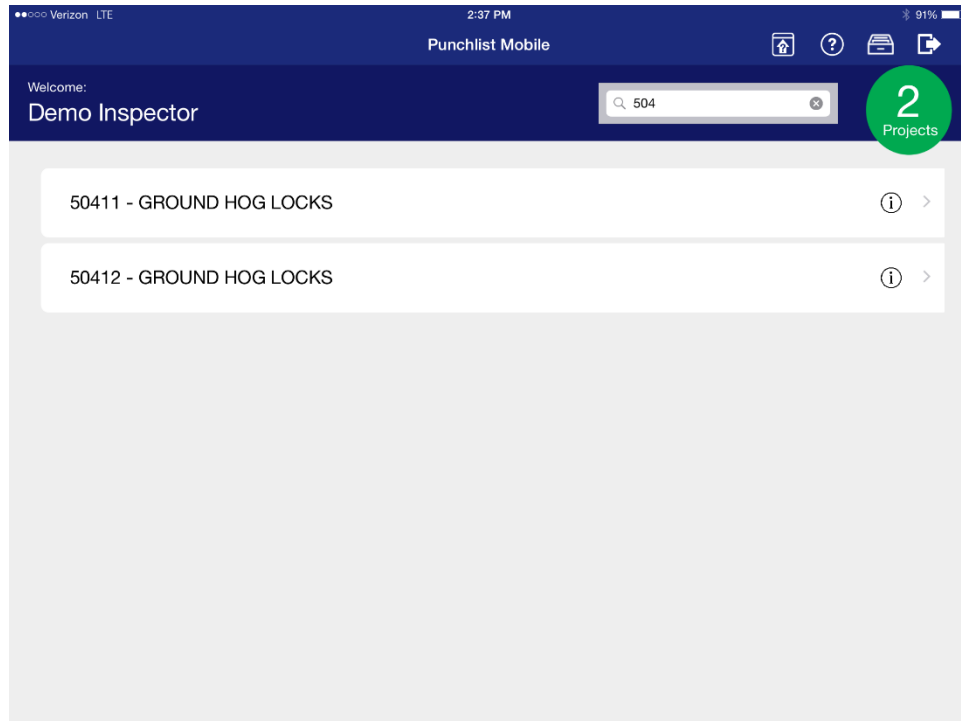
Selecting a Project

To select a project, click anywhere on the Project Information. This will take you to the Punchlist Dashboard screen for the project.

Punchlist/Final Punchlist Indicators

Indicators for both Punchlist and Final Punchlist will display in line with each project, if applicable, to provide status without the need to open each project. If no icons are displayed, then no Punchlists exist for the project. Below, the state of each icon is outlined.

Punchlist exists for project and is open

Punchlist exists for project and is closed

Final Punchlist exists for project and is open

Final Punchlist exists for project and is closed

Refresh

At times, data may have been updated in ECMS while you are working in the Punchlist app. If this occurs and you navigate to the Project List screen, you will see a download icon in line with the project that has been changed.
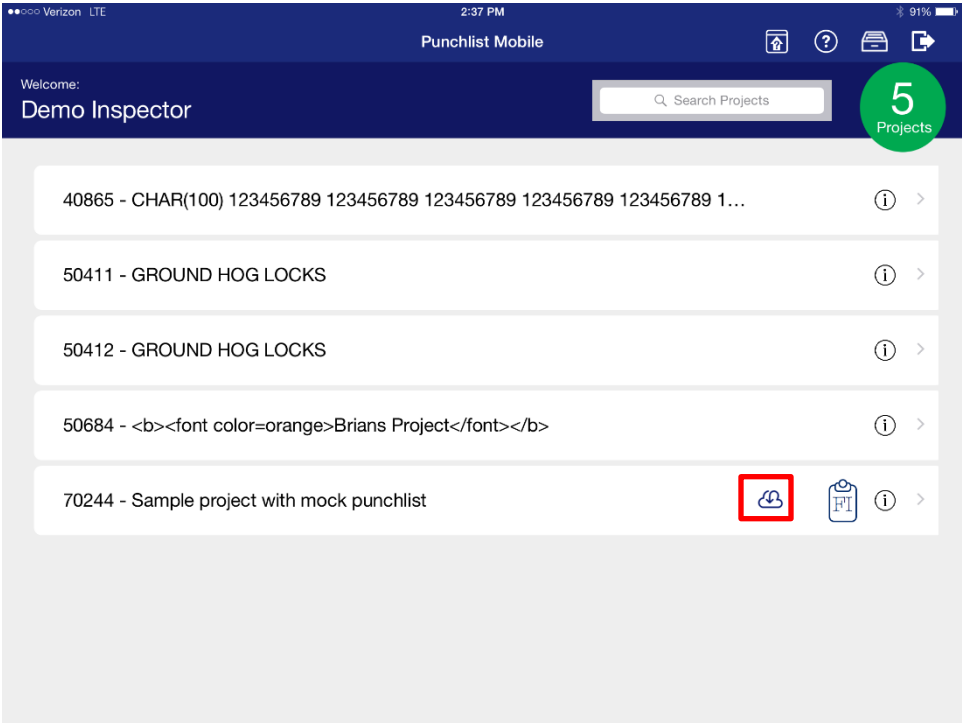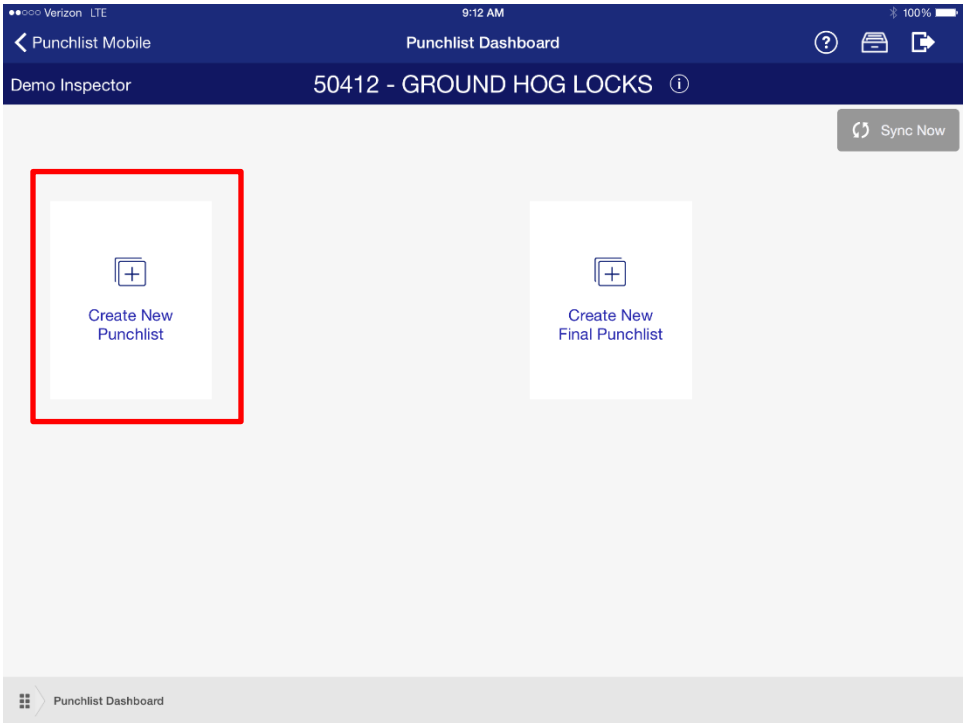

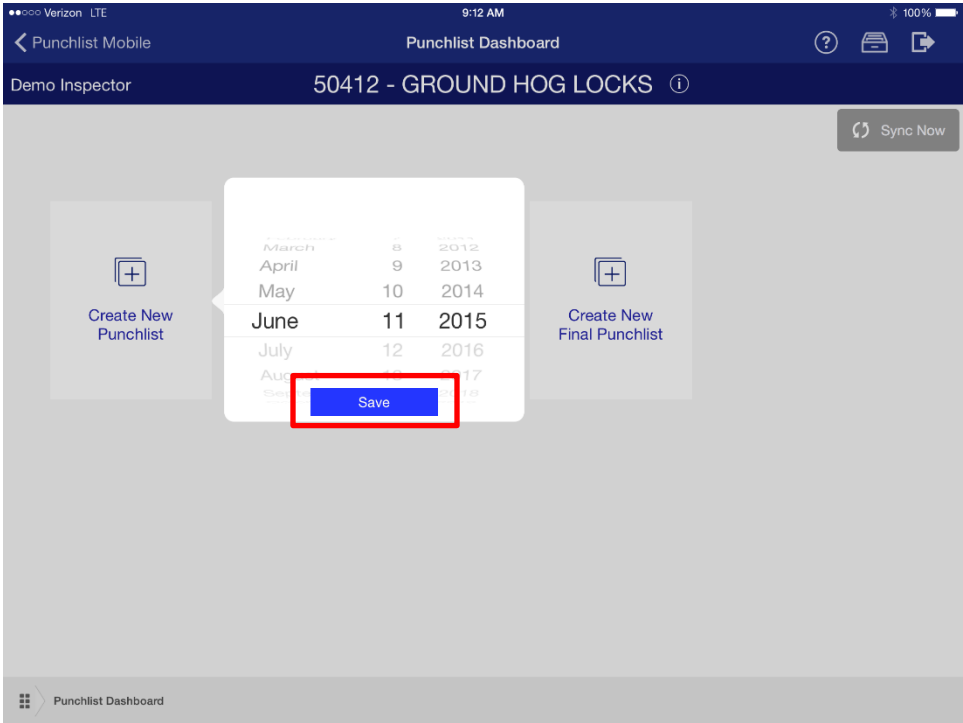Then, when you access that project, it will be updated with the new data.

Punchlist Dashboard
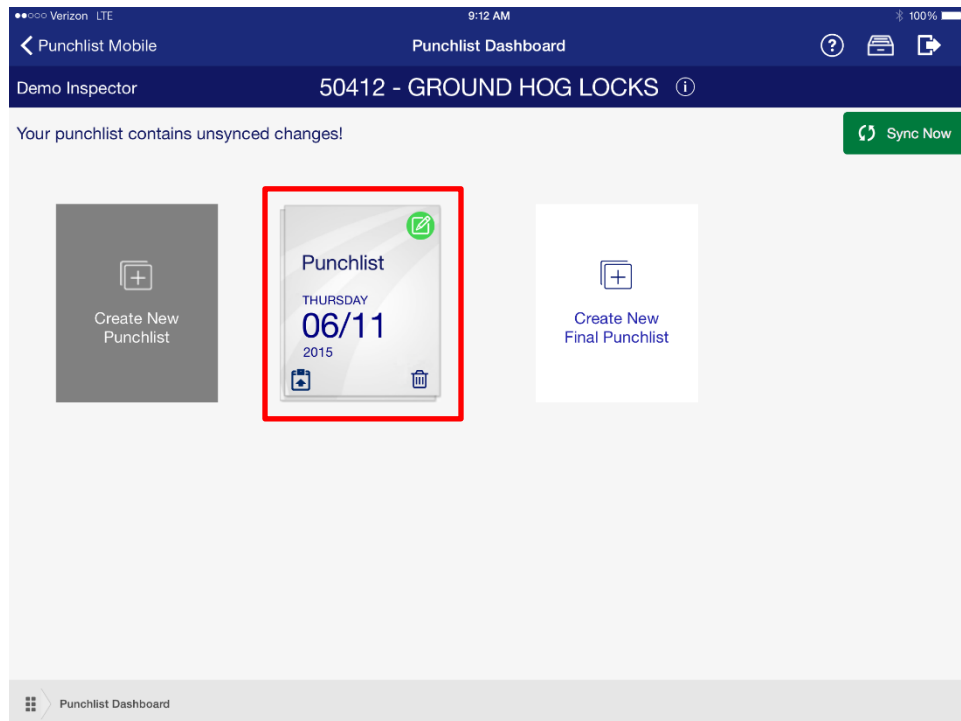
Create New Punchlist

To create a new punchlist, tap on the "Create New Punchlist" button.

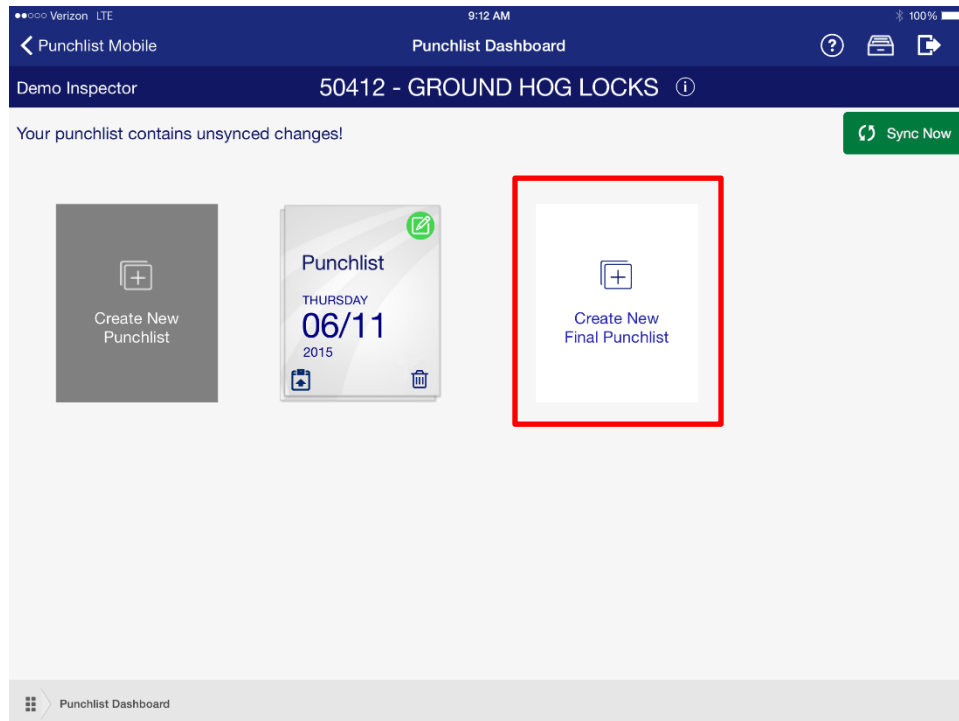Then, select a date for the Punchlist and click Save.
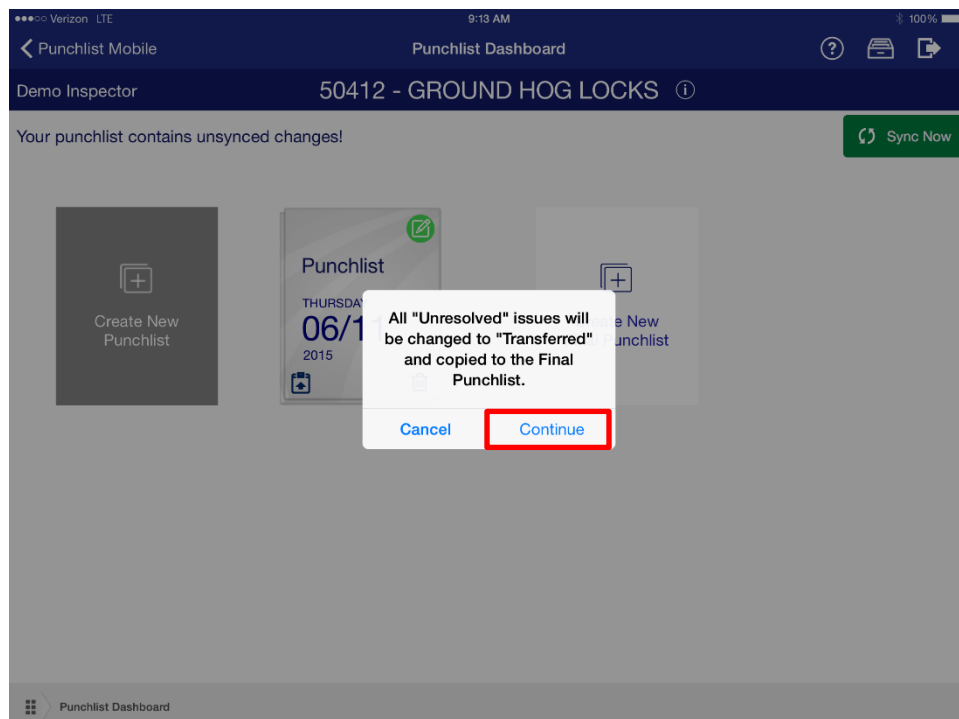
The new Punchlist will be displayed.

Create New Final Punchlist

To create a new Final Punchlist, tap on the "Create New Final Punchlist" button.

If there is an open Punchlist with unresolved discrepancies when you create a Final Punchlist, you will receive a notification indicating that all unresolved discrepancies will be moved from the Punchlist to the Final Punchlist. Select Cancel to stop creating the Final Punchlist or Continue to proceed.
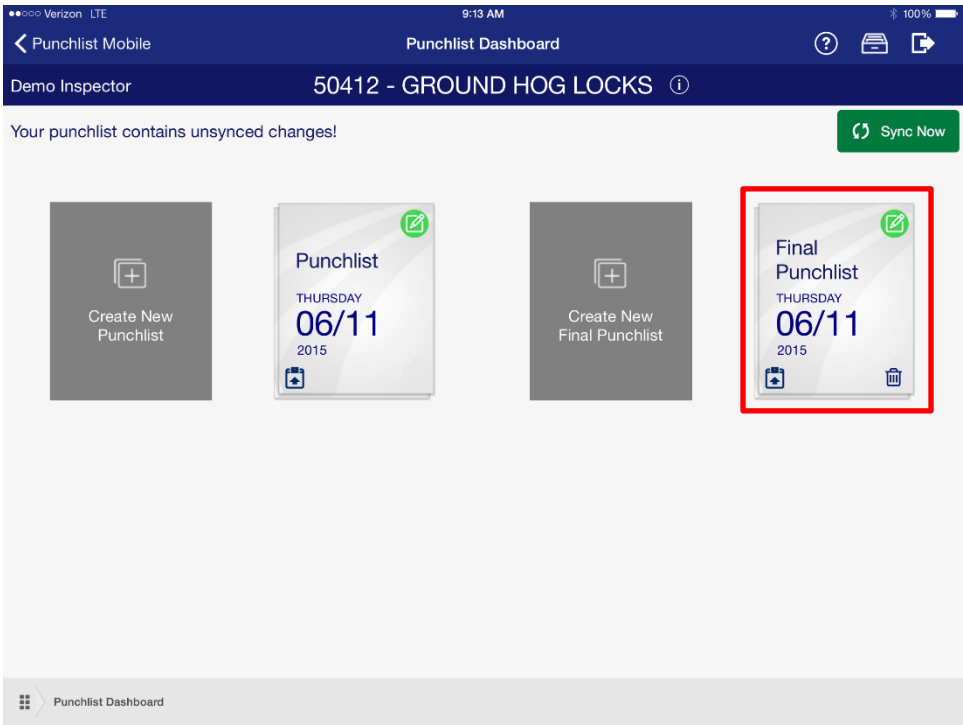
Note: In order to create Final Punchlist, user has to sync all the changes made by him in Initial Punchlist.

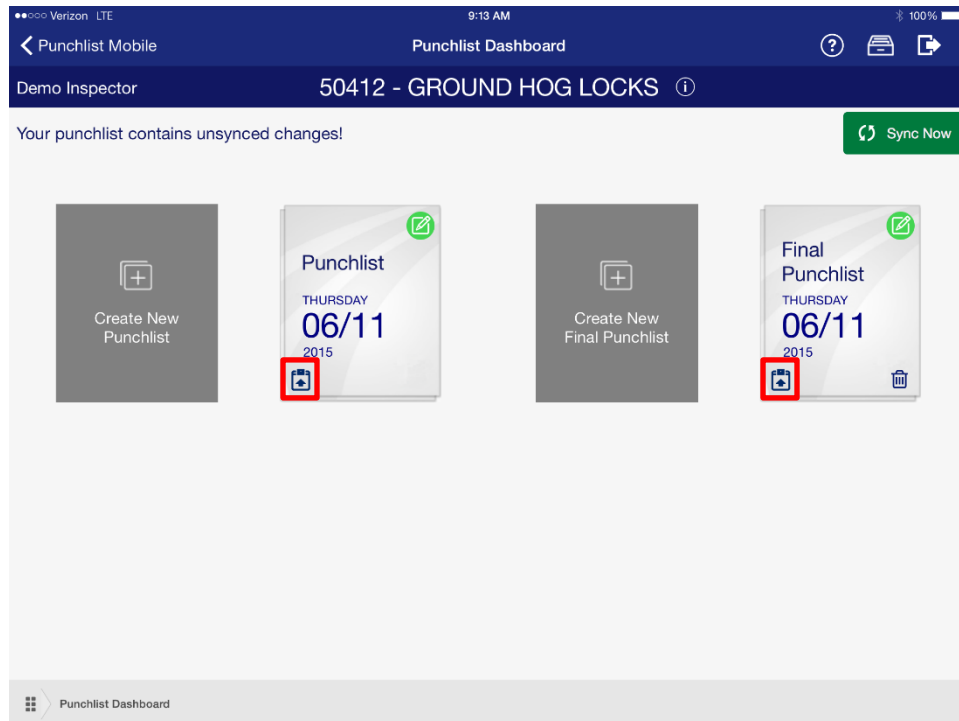Select a date for the Final Punchlist and click Save.
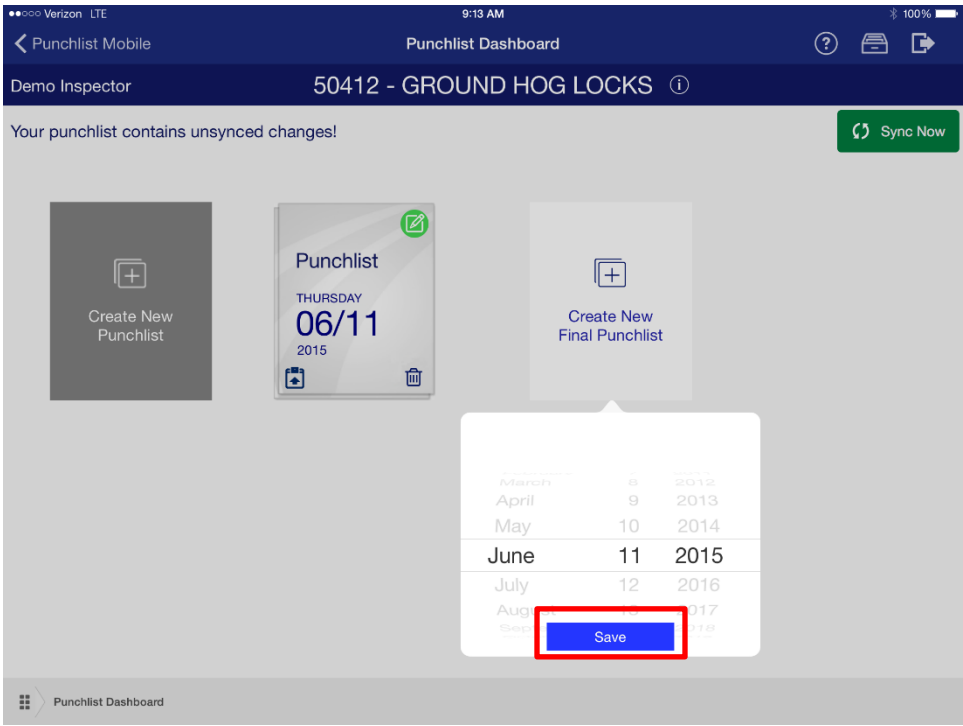
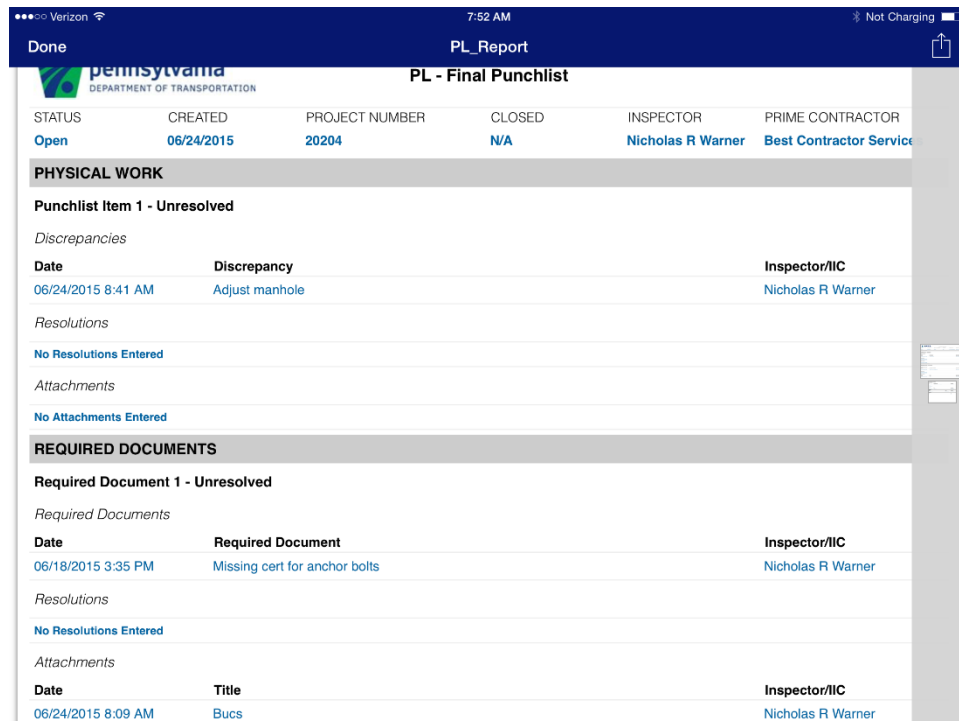The new Final Punchlist will be displayed.

Summary View

If you need a quick, one page summary of a Punchlist or Final Punchlist, tap on the Summary View icon.
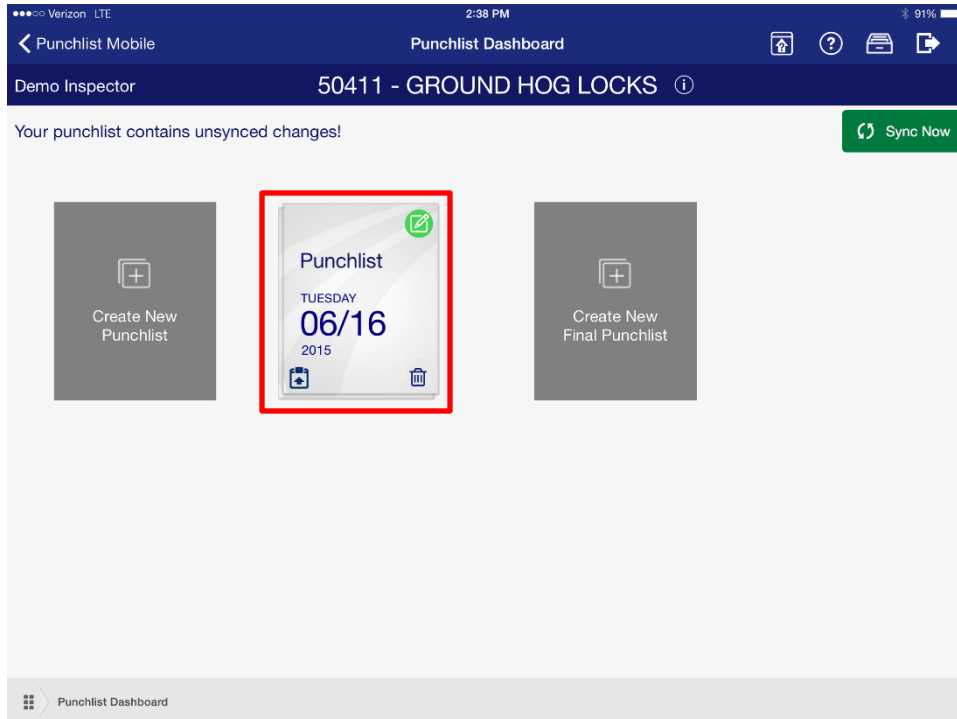

This will display a summary view containing all Punchlist information on one, scrollable screen.
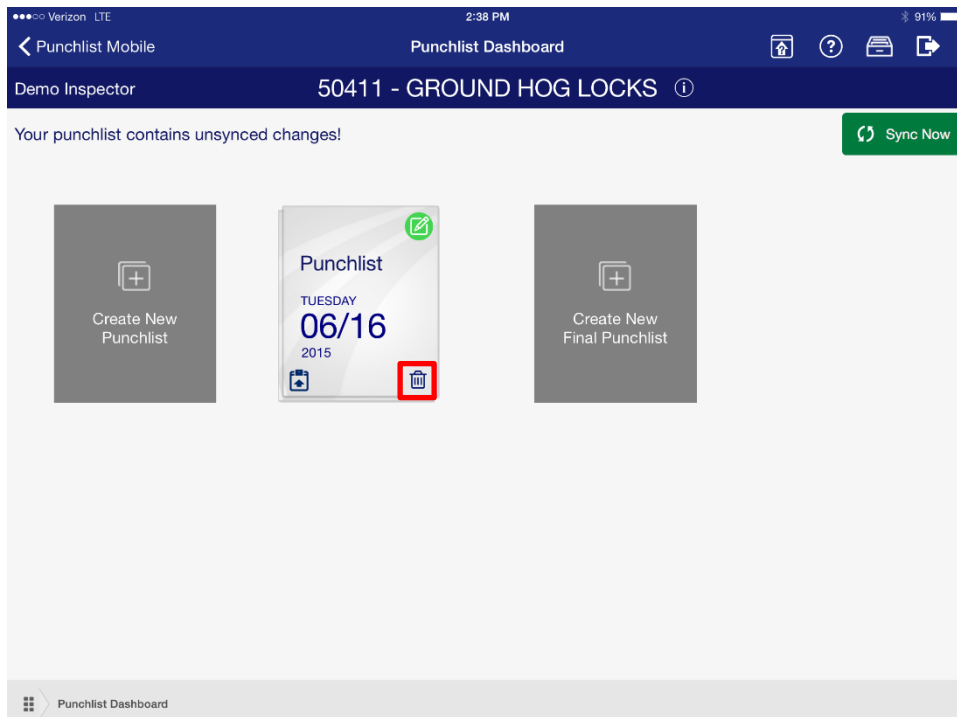
Selecting a Punchlist/Final Punchlist

To select a Punchlist/Final Punchlist, simply tap on the applicable icon.

Delete a Punchlist or Final Punchlist

To delete a Punchlist or Final Punchlist, tap the trash can button on the respective icon.

Please note: You CANNOT delete a closed Punchlist or Final Punchlist. If a Punchlist or Final Punchlist is unable to be deleted, the trash can button will not display, as seen on the Punchlist icon below.

Please note: You CANNOT delete a closed or synced Punchlist. If a Punchlist or Final Punchlist is unable to be deleted, the trash can button will not display, as seen on the Punchlist icon below.
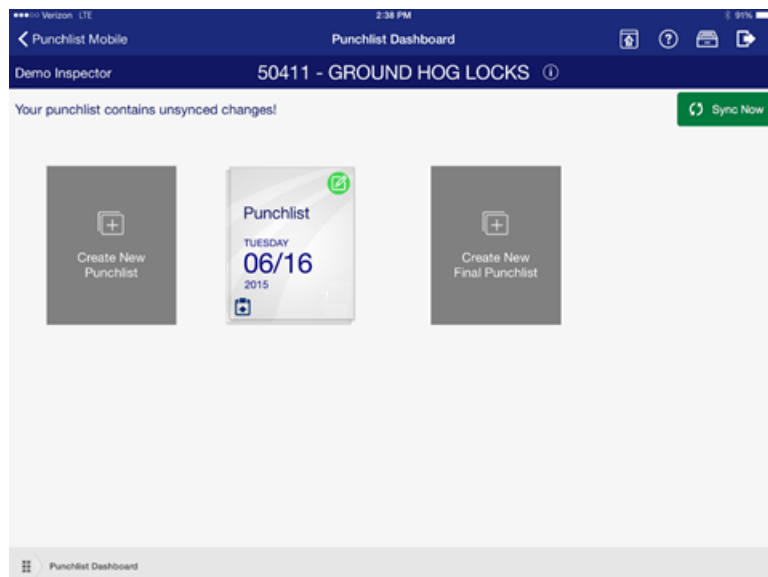
Punchlist Details

After selecting a Punchlist, you will be taken to the Punchlist Details screen. This includes the Punchlist Date, who created it, the status of the Punchlist as well as access to Physical Work Items, Required Documents and Comments.
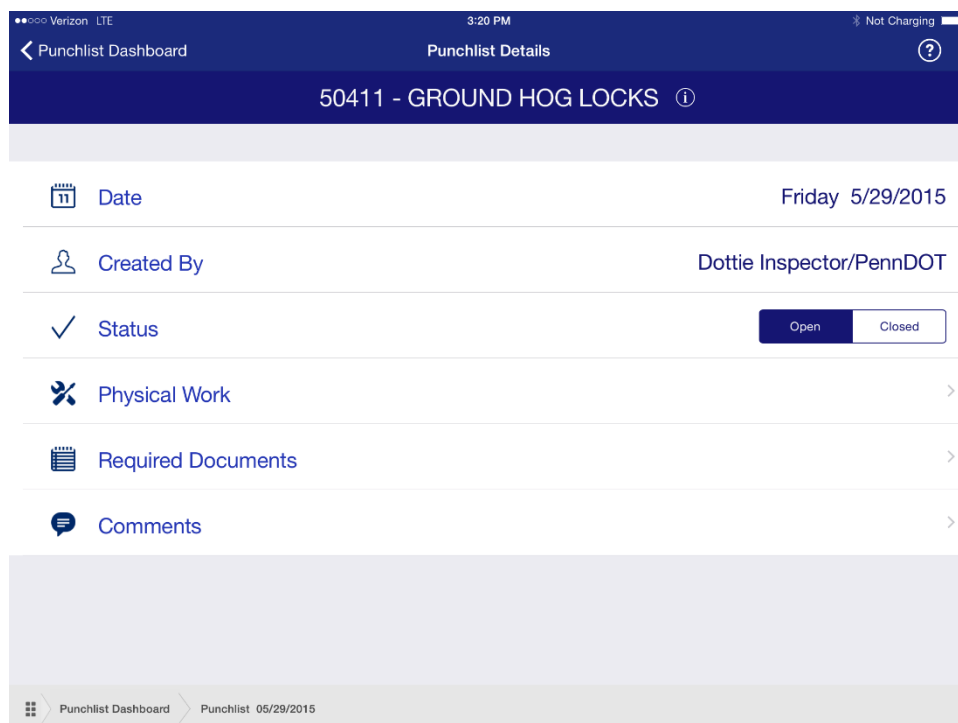
If you are accessing a Final Punchlist, there will also be an Attendees category.

Date

The date reflects what was chosen when the Punchlist was created. If you need to change the date, simply tap on the date, adjust it accordingly and tap Save.

Please Note: Once synced with ECMS, the date cannot be changed.

Status

To change the Punchlist status, tap the appropriate state on the status button.
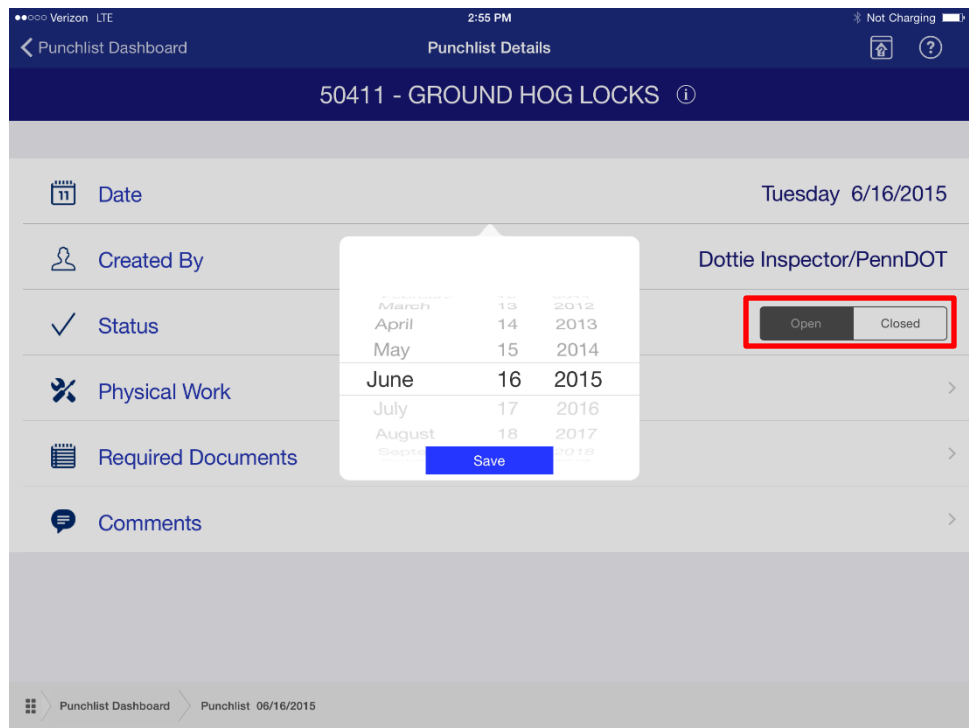
Physical Work Items

Accessing Physical Work Items

To access Physical Work Items, tap anywhere on the Physical Work row on the Project Details screen.
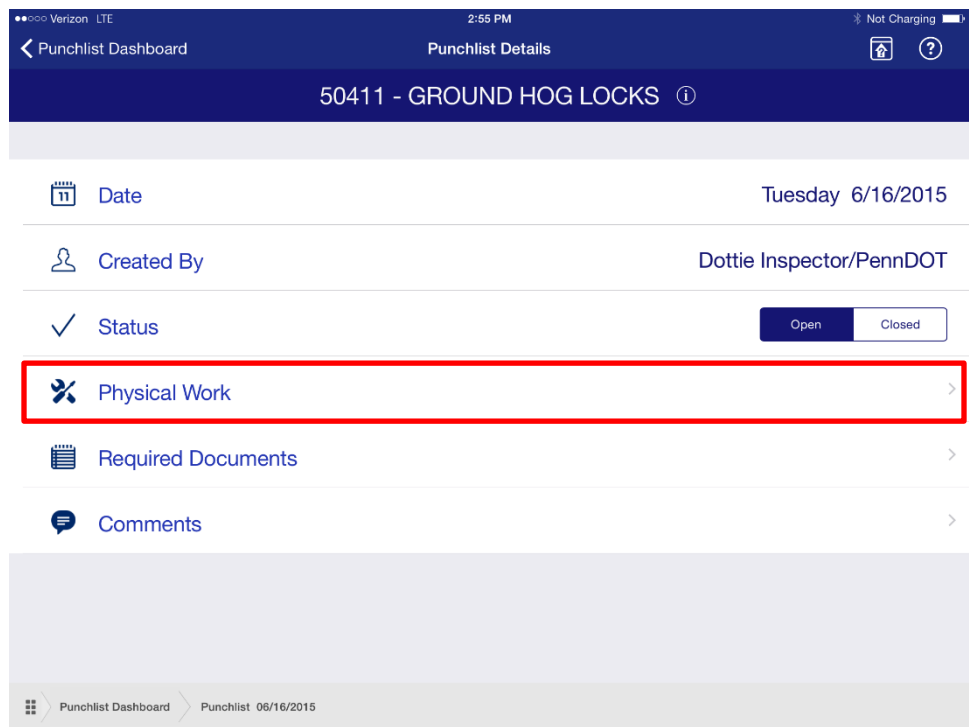
The Physical Work Items screen will be displayed.
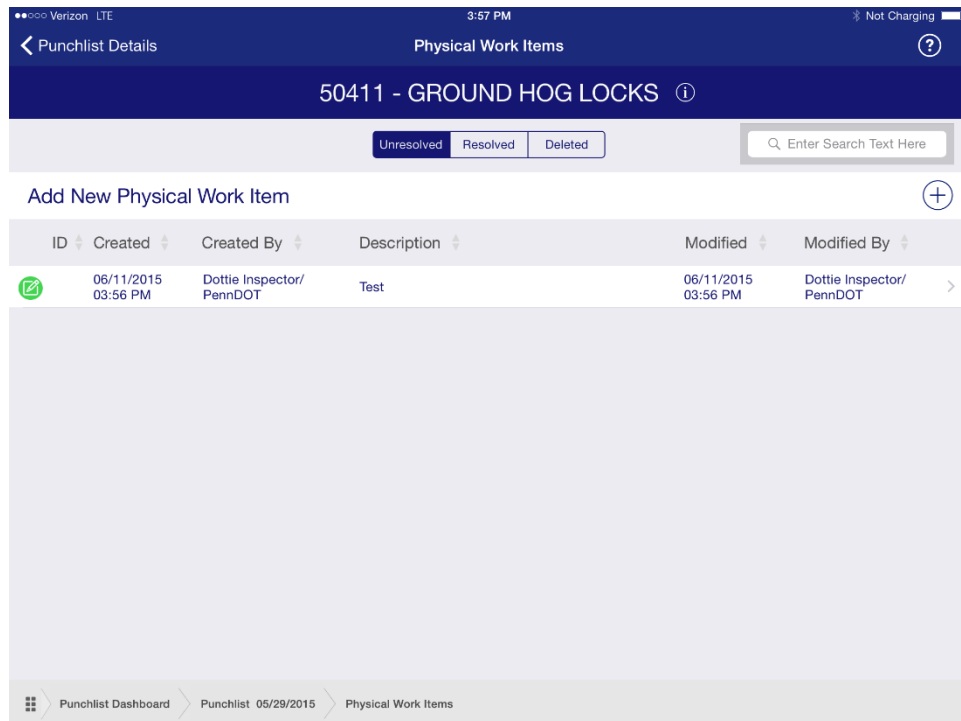
Creating a New Physical Work Item

To create a new Physical Work Item, tap anywhere on the "Add New Physical Work Item" row.
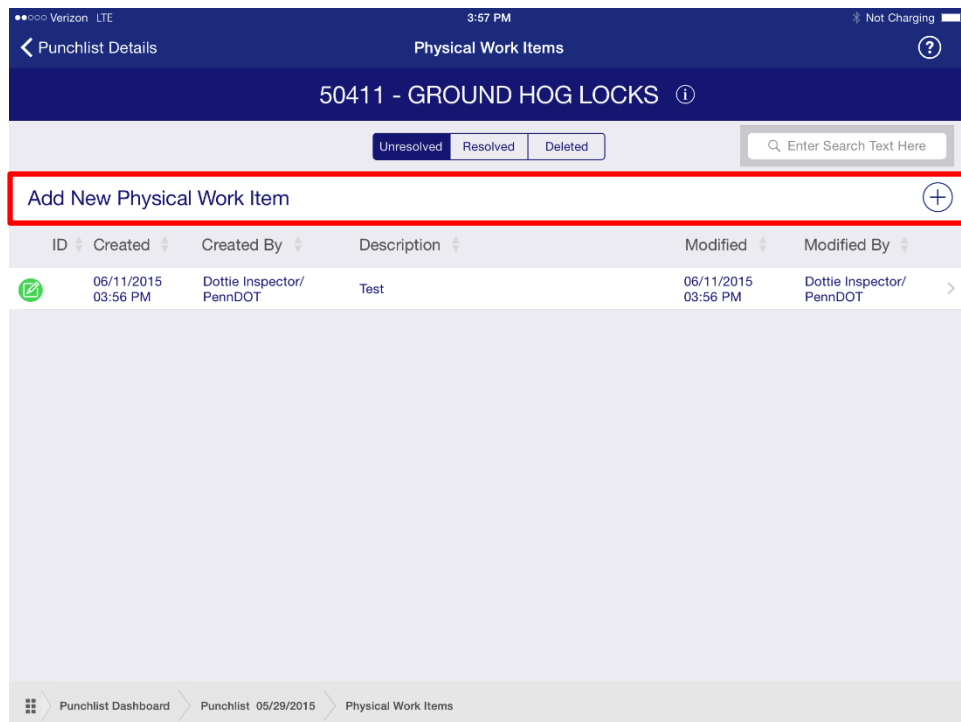
You will be taken to the Physical Work Item Details screen for the new item.

In order for the Physical Work Item to be retained, you must add at least one discrepancy. To do so, tap on the "Add New Discrepancy" row. On the text window that displays, type in the discrepancy.

When you navigate back to the Physical Work Items screen, the new item will be displayed in the list.
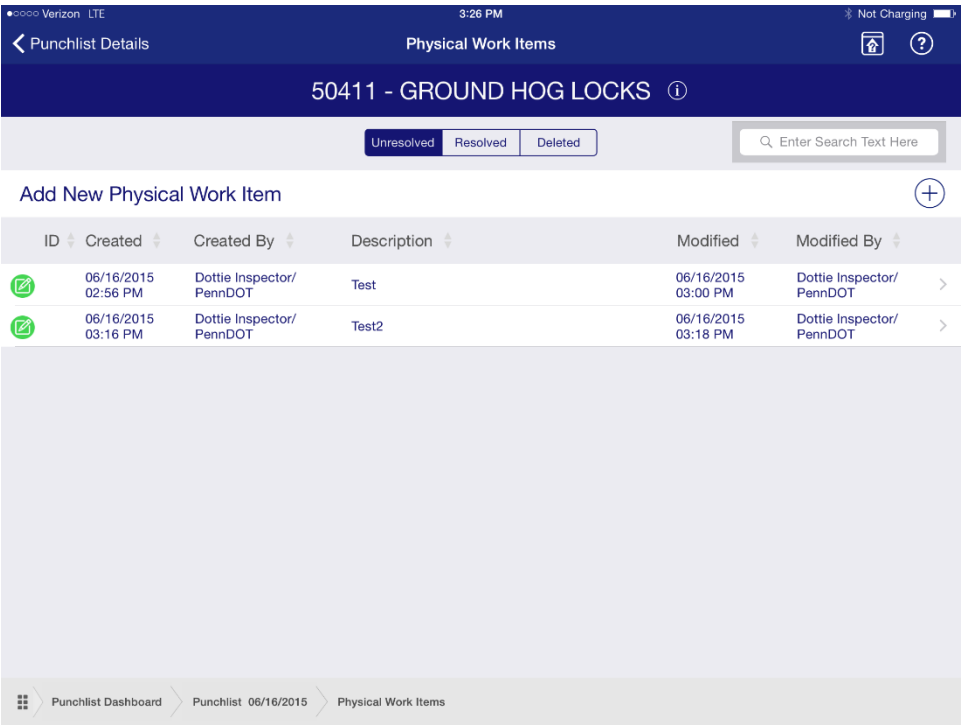
Editing a Physical Work Item

To edit an existing Physical Work Item, tap on its row from the Physical Work Items screen.

The Physical Work Item Details screen is displayed.

Adding a new Discrepancy

To add a new discrepancy, tap on the Add New Discrepancy button.

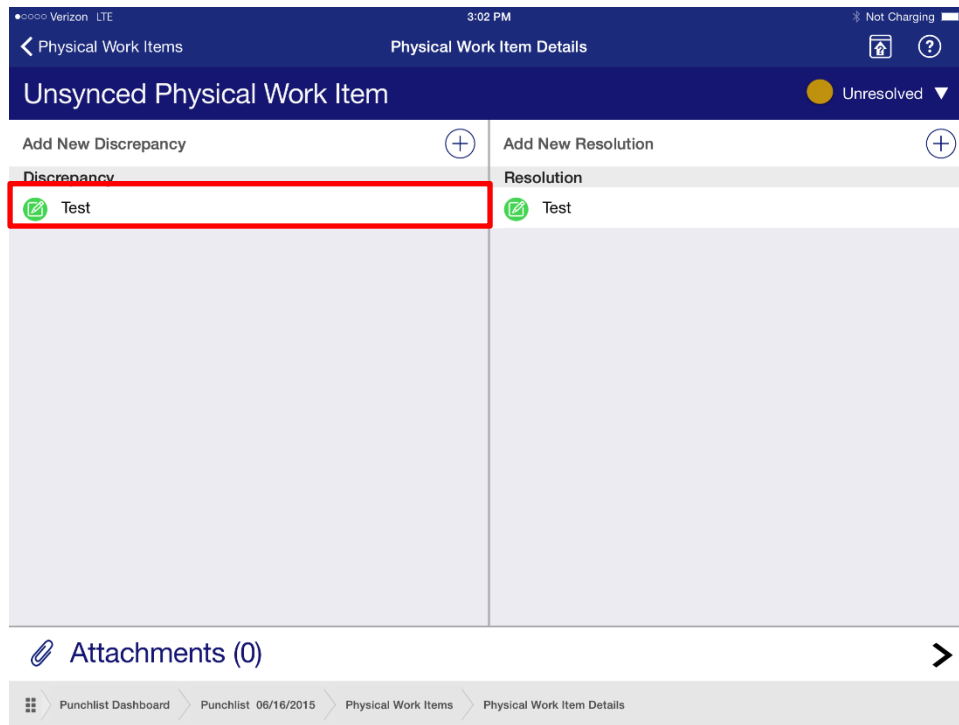On the text window that displays, enter the discrepancy. After you are finished, select Done.

The new discrepancy will appear on the Physical Work Item Details screen.
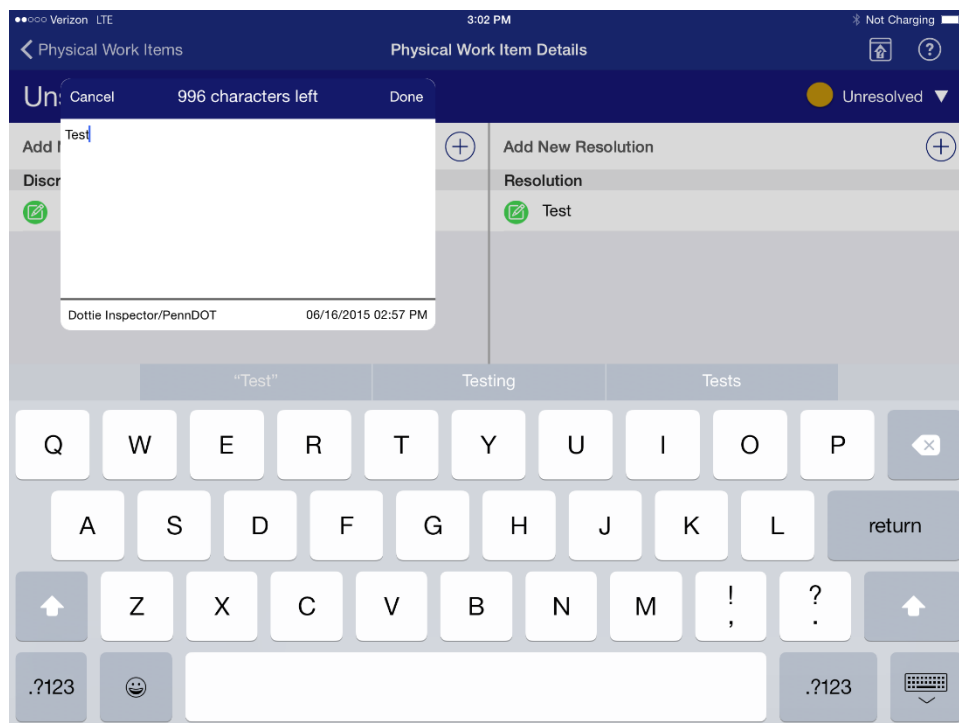
Editing a Discrepancy

If a discrepancy has an editable icon ![icon] you can edit it by tapping on the respective row.

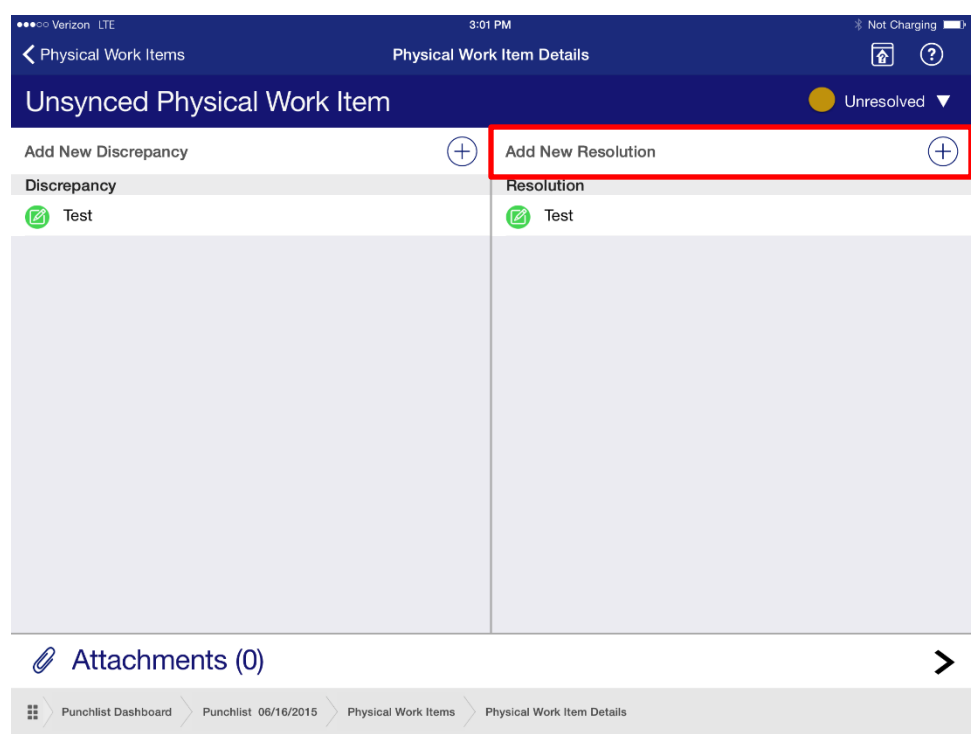On the text window that is displayed, adjust the entry as necessary.

Deleting a Discrepancy

To delete a Discrepancy, swipe the row from right to left to reveal the delete button. Tap the delete button to delete the discrepancy.
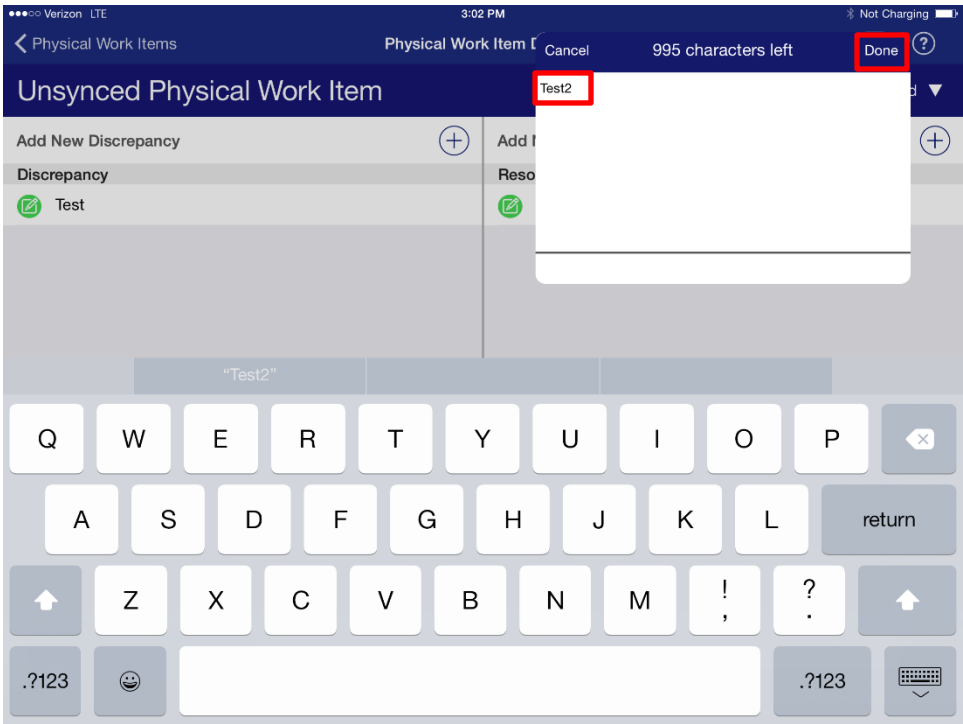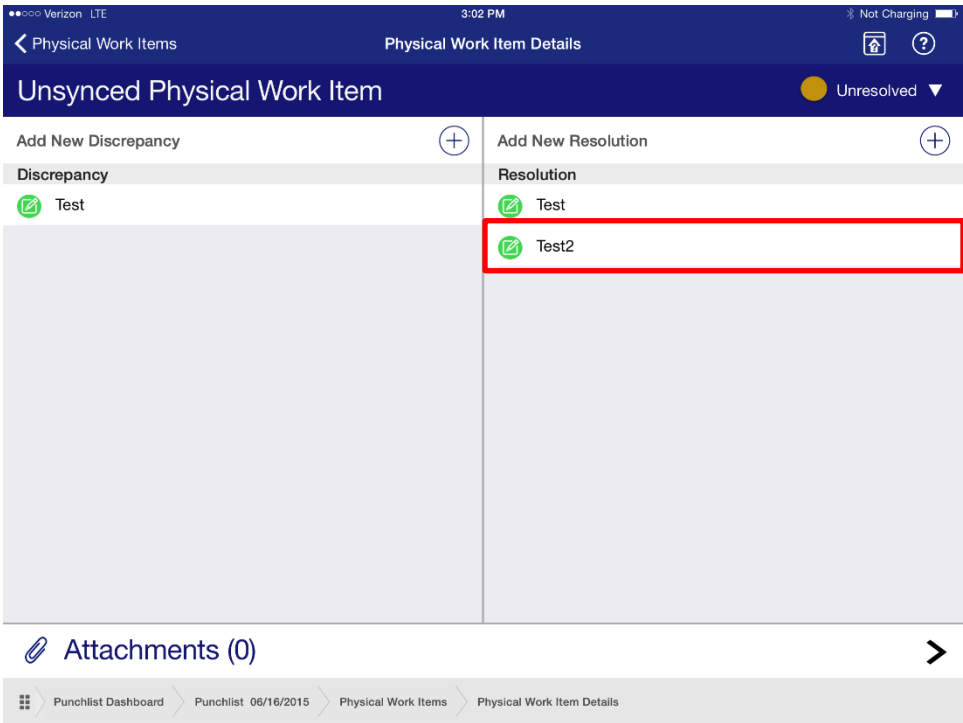

Adding a new Resolution

To add a new resolution, tap on the Add New Resolution row.

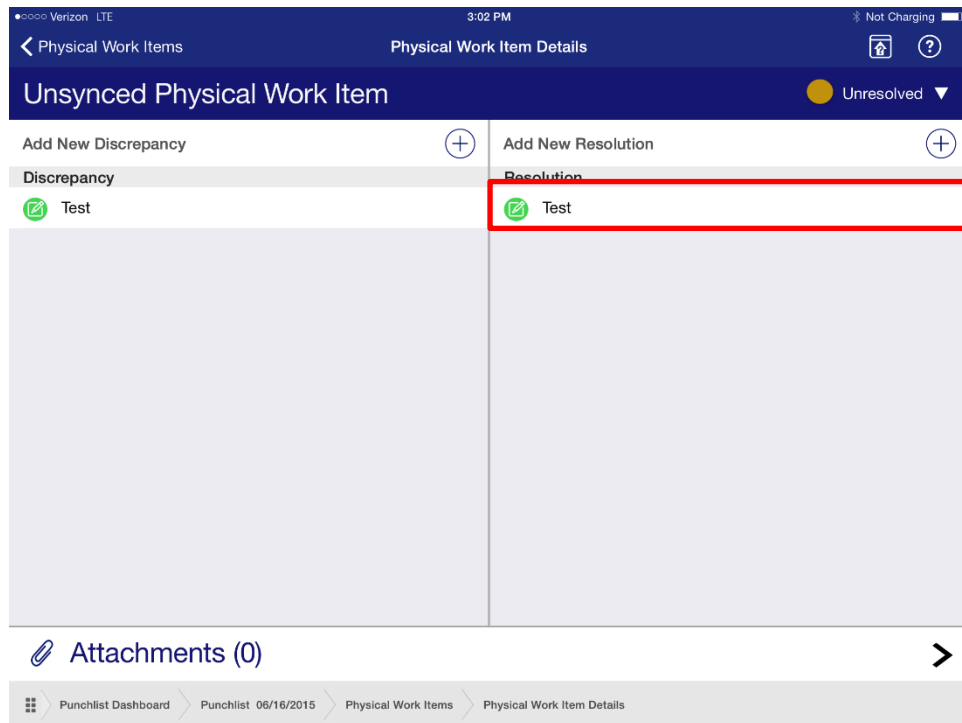On the text window that displays, enter the resolution description and tap Done.

The new resolution will display on the Physical Work Item Details list.

Editing a Resolution

From the Physical Work Item Details screen, tap on the resolution to be edited.

Remember, the resolution must be displaying the editable icon. If the resolution has already been synced to ECMS, you will not be able to change it.
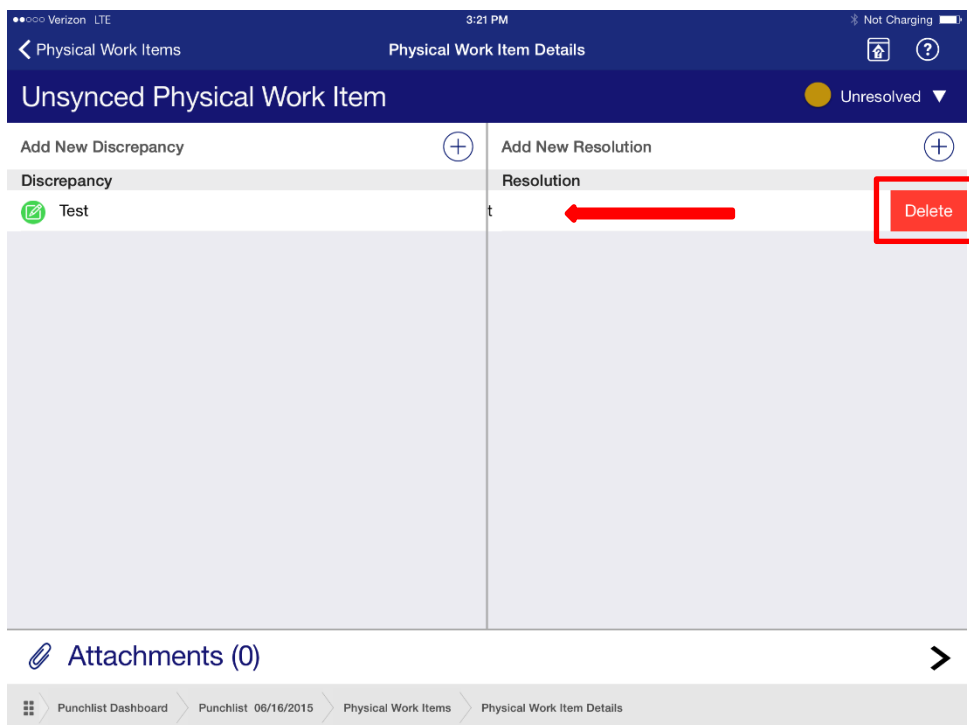

On the text window that displays, adjust the resolution as necessary.
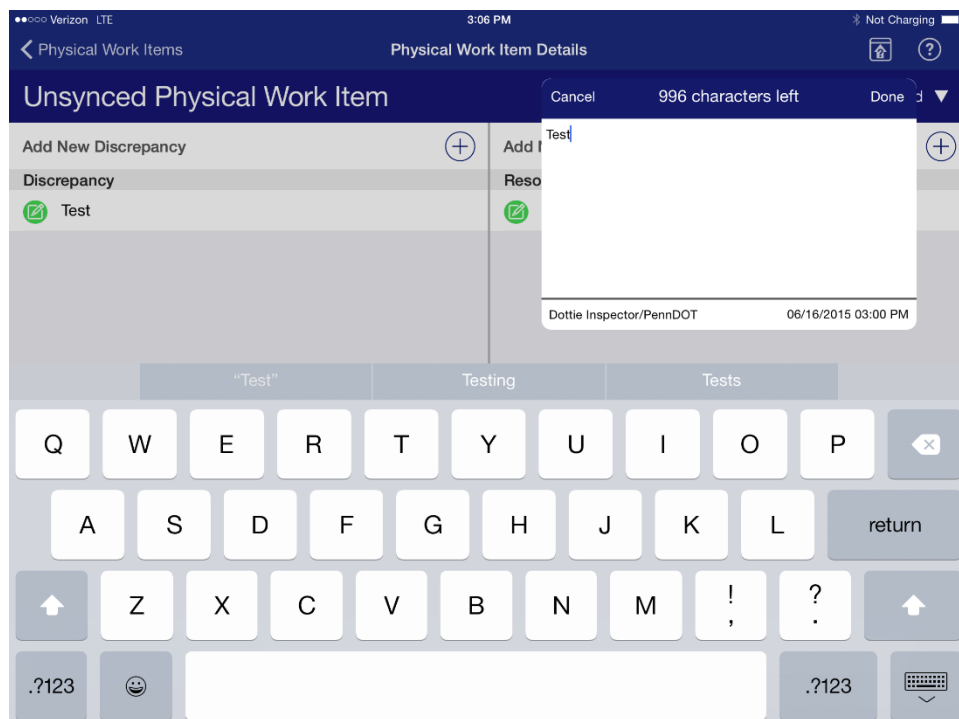
Deleting a Resolution

To delete a Resolution, swipe the row from right to left to reveal the delete button. Tap the delete button to delete the discrepancy.
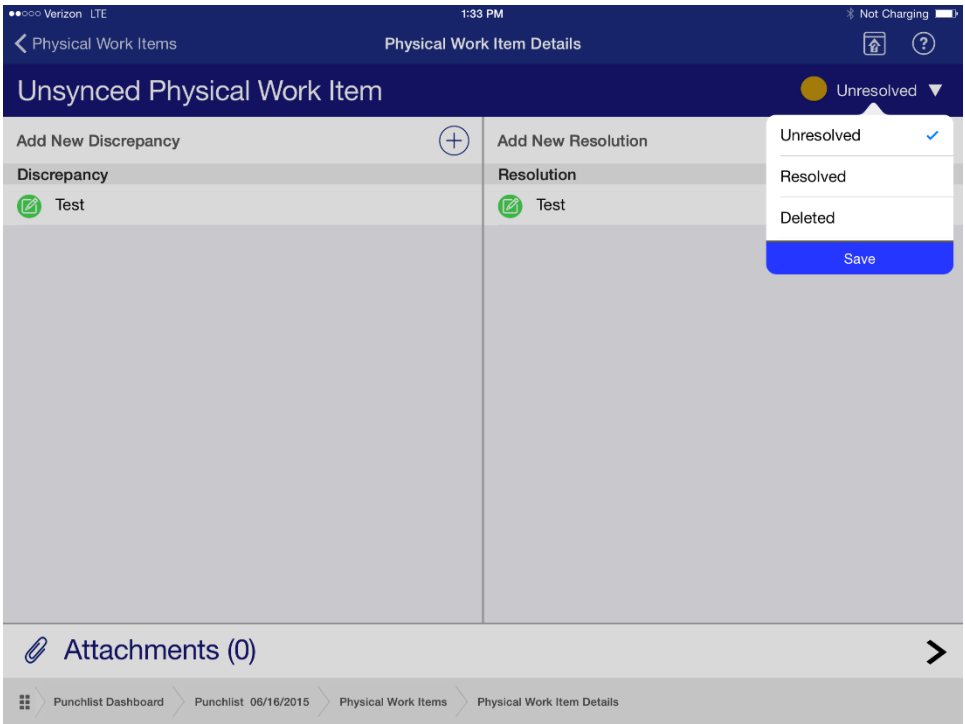

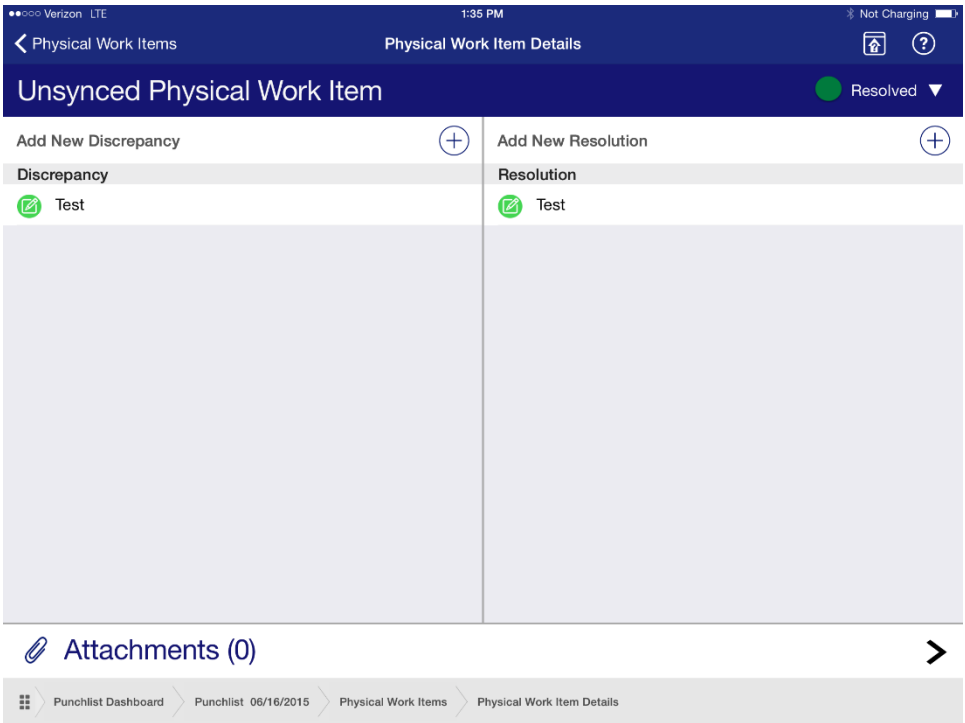## Changing Physical Work Item Status

To change a Physical Work Item's status, tap on the status in the upper right corner on the Physical Work Item Details screen.
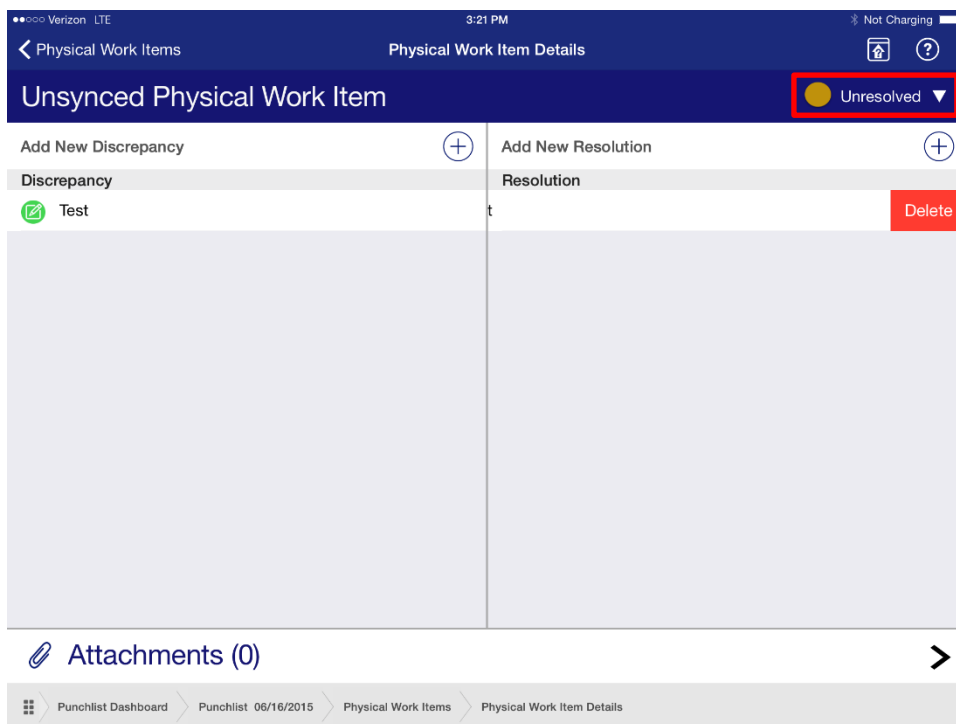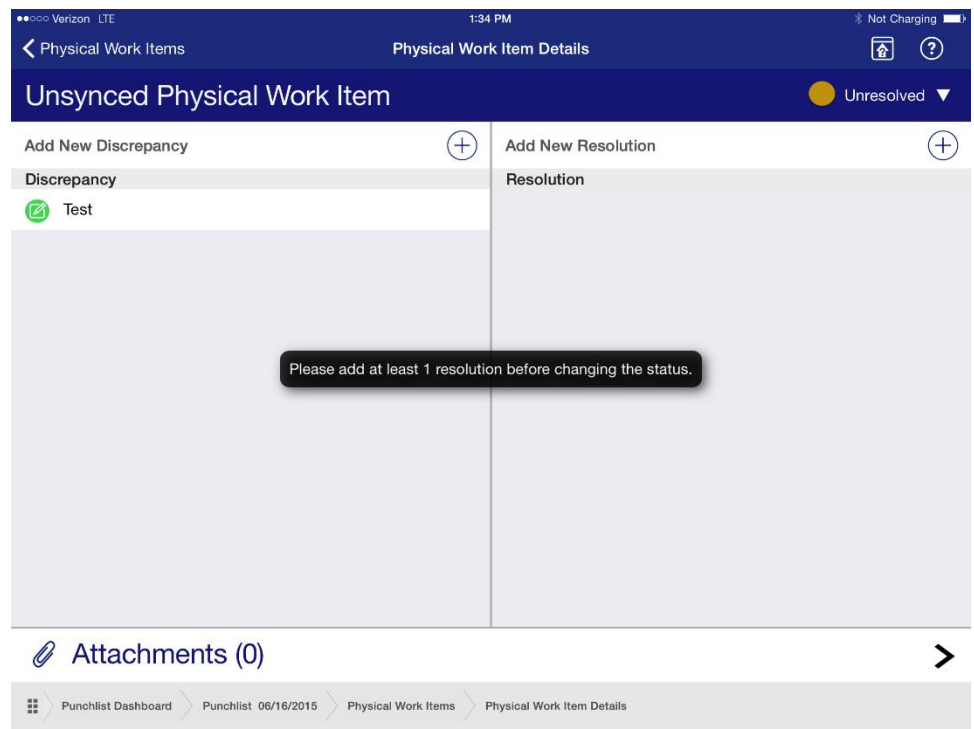
On the dropdown that displays, select the appropriate status and tap Save.

After selection, the updated status will be displayed.

Please Note: If you are attempting to change a Physical Work Item to Resolved you must first enter a resolution. Otherwise, you will get the error message seen below.
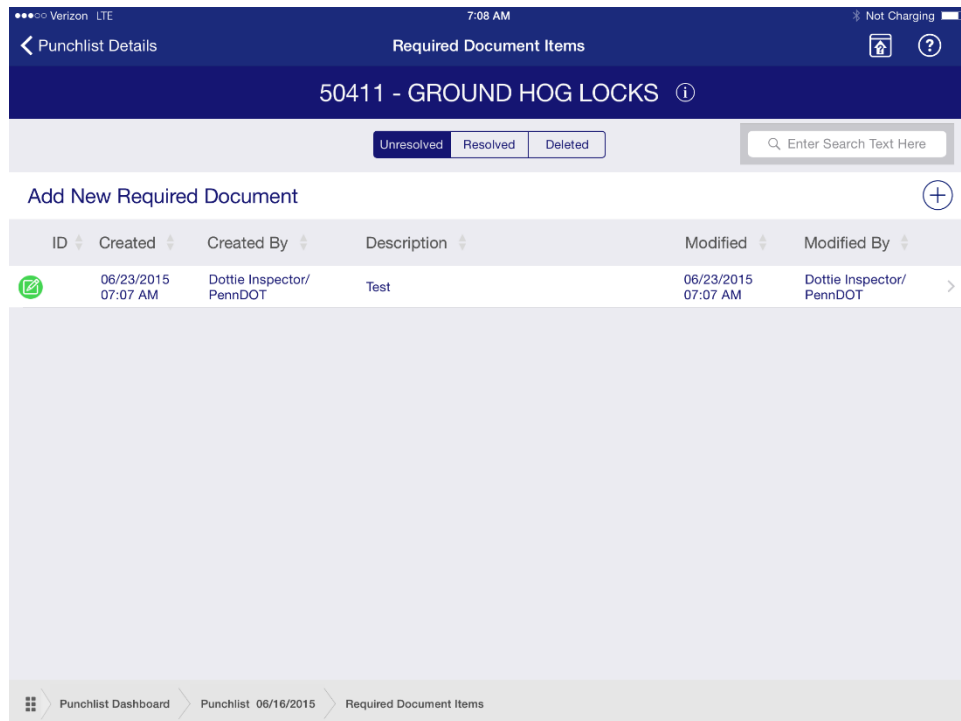

Required Documents

Accessing Required Documents

To access Required Documents, tap anywhere on the Required Documents row on the Project Details screen.
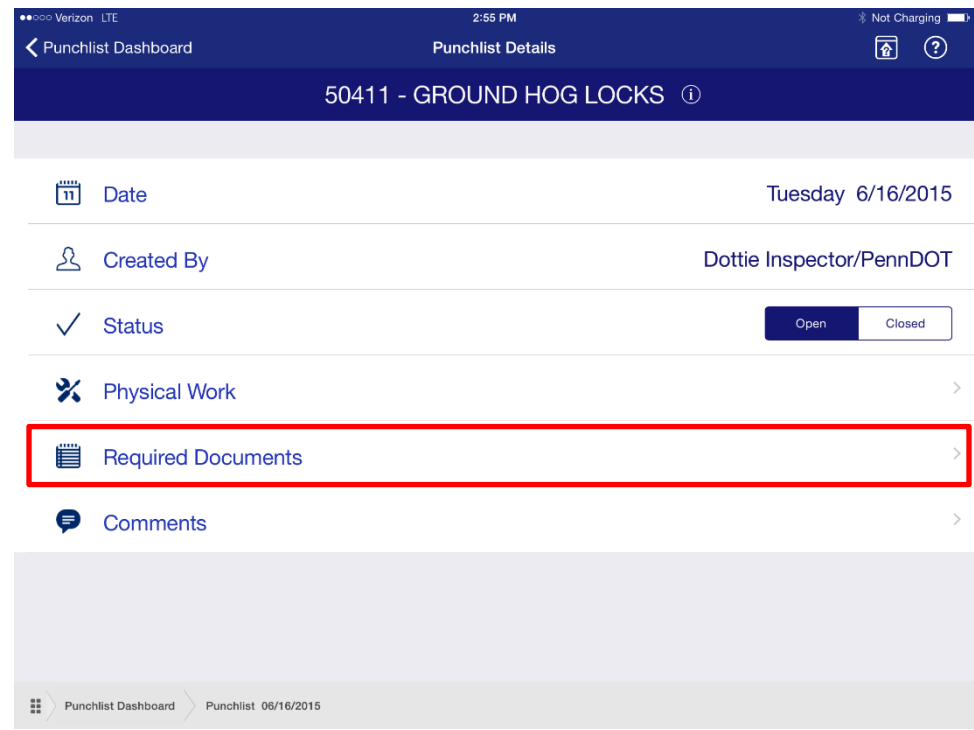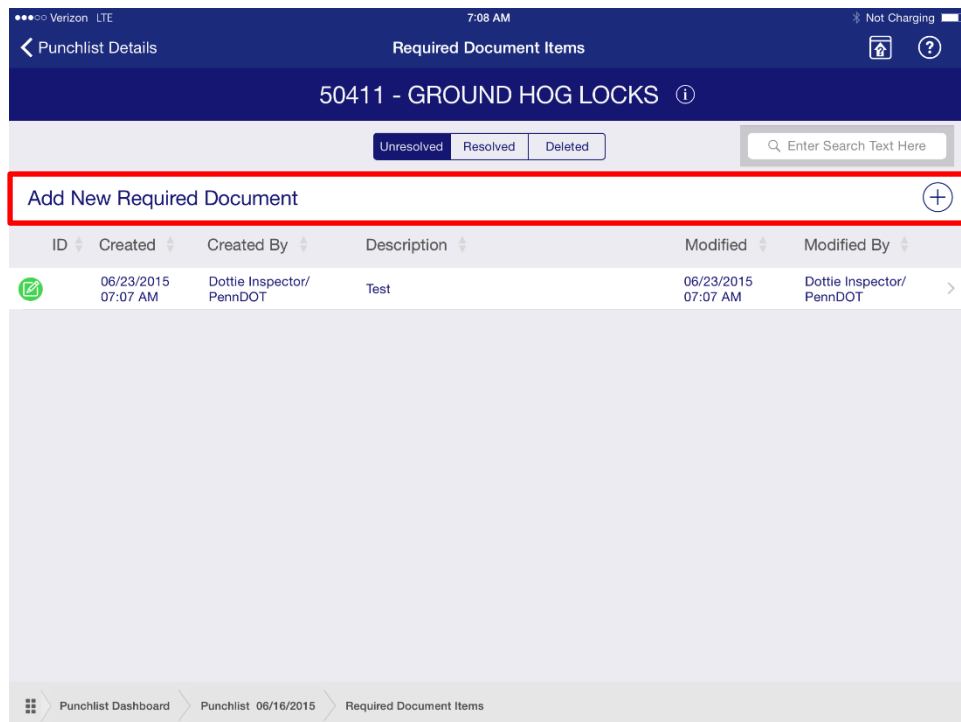
The Required Documents screen will be displayed.

Creating a new Required Document

To create a new Required Document, tap anywhere on the Add New Required Document row.

You will be taken to the Required Document Details screen for the new item.

In order for the Required Document to be retained, you must add at least one discrepancy. To do so, tap on the "Add New Discrepancy" row. On the text window that displays, type in the discrepancy.
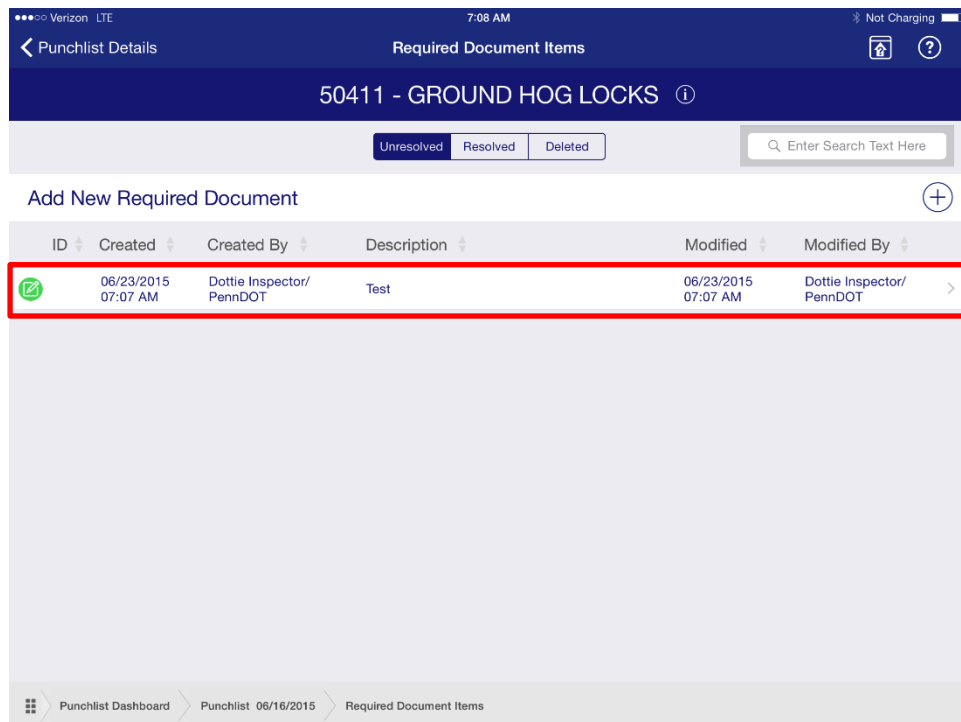
When you navigate back to the Required Documents screen, the new item will be displayed in the list.
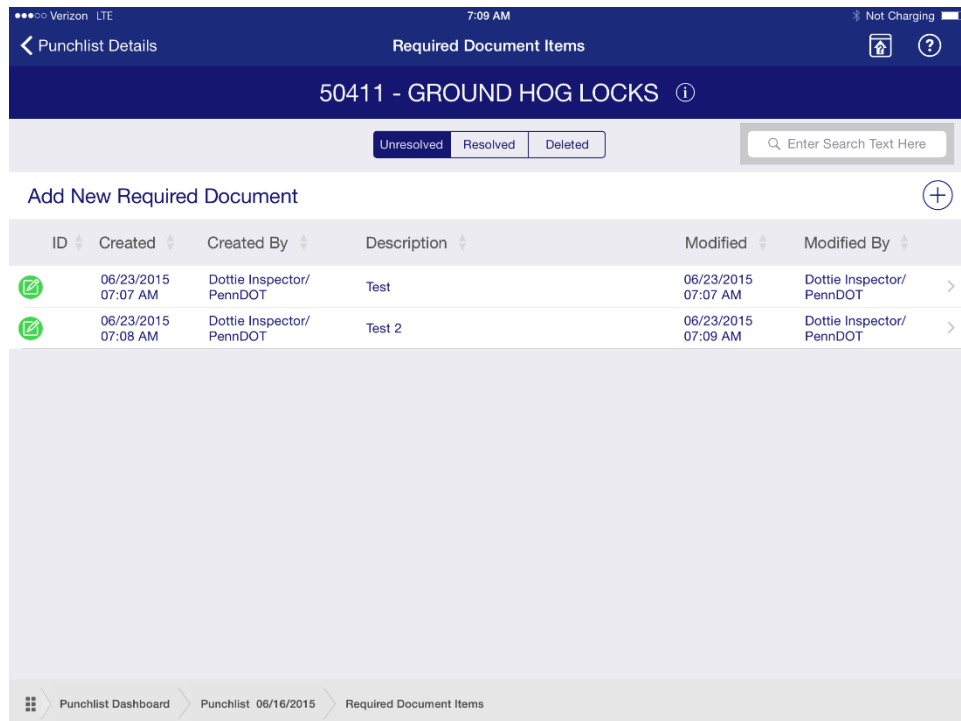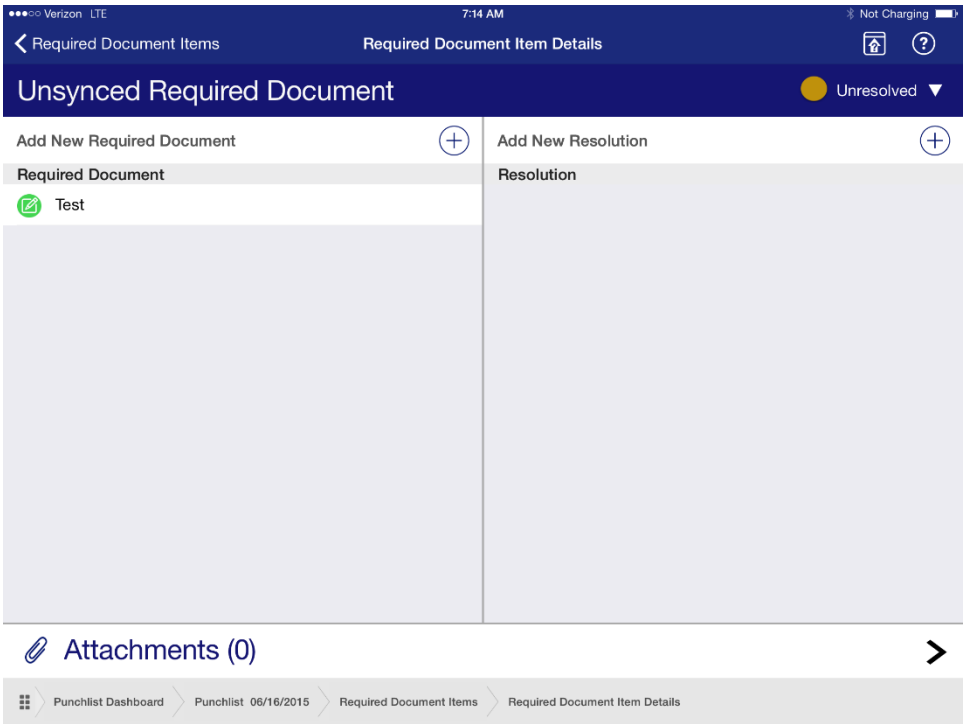

Editing a Required Document

To edit an existing Required Document, tap on its row from the Required Documents screen.
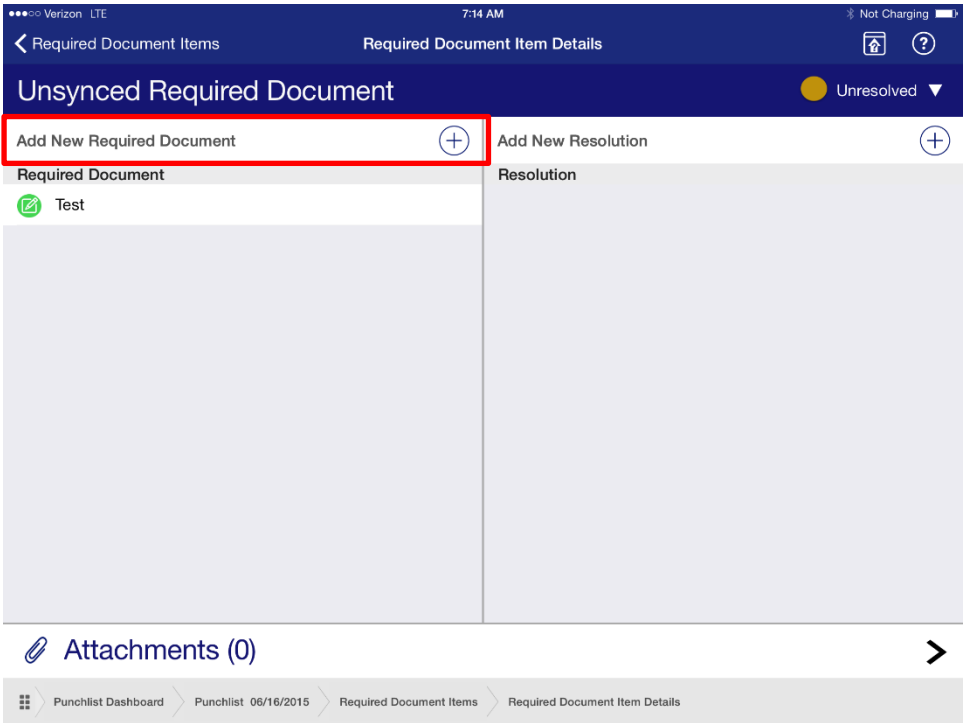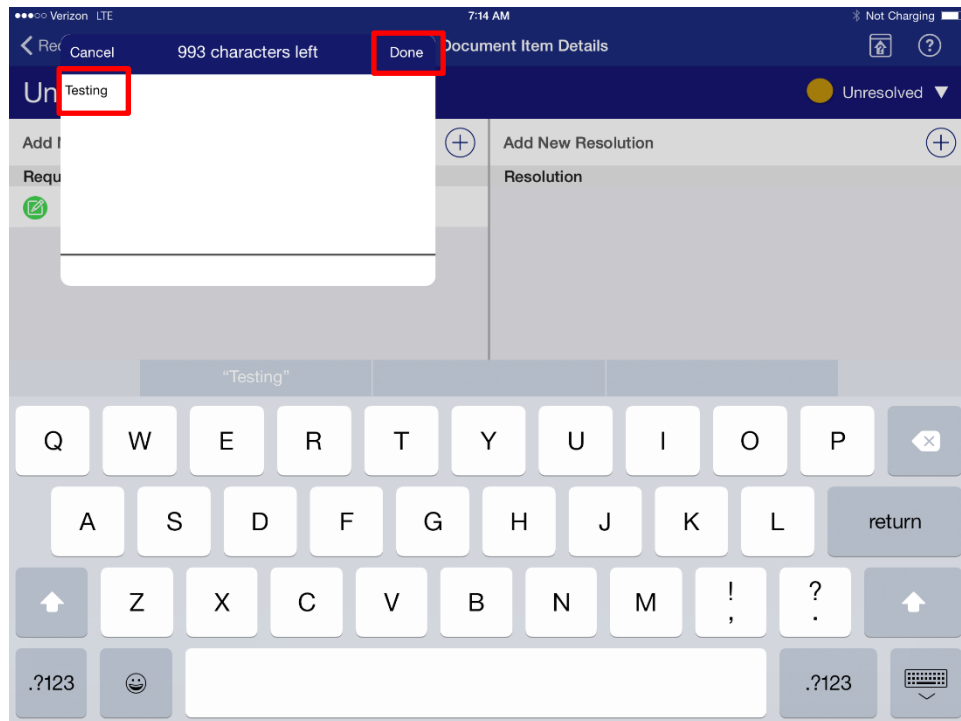
The Required Document Details screen is displayed.

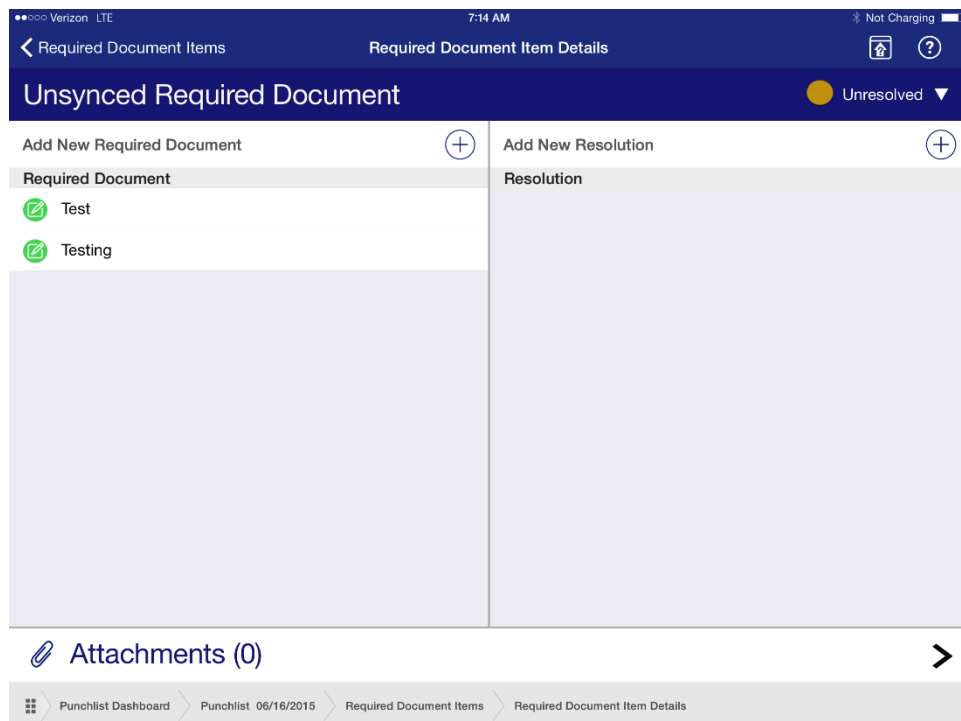

Adding a new Discrepancy

To add a new discrepancy, tap on the "Add New Discrepancy" button.

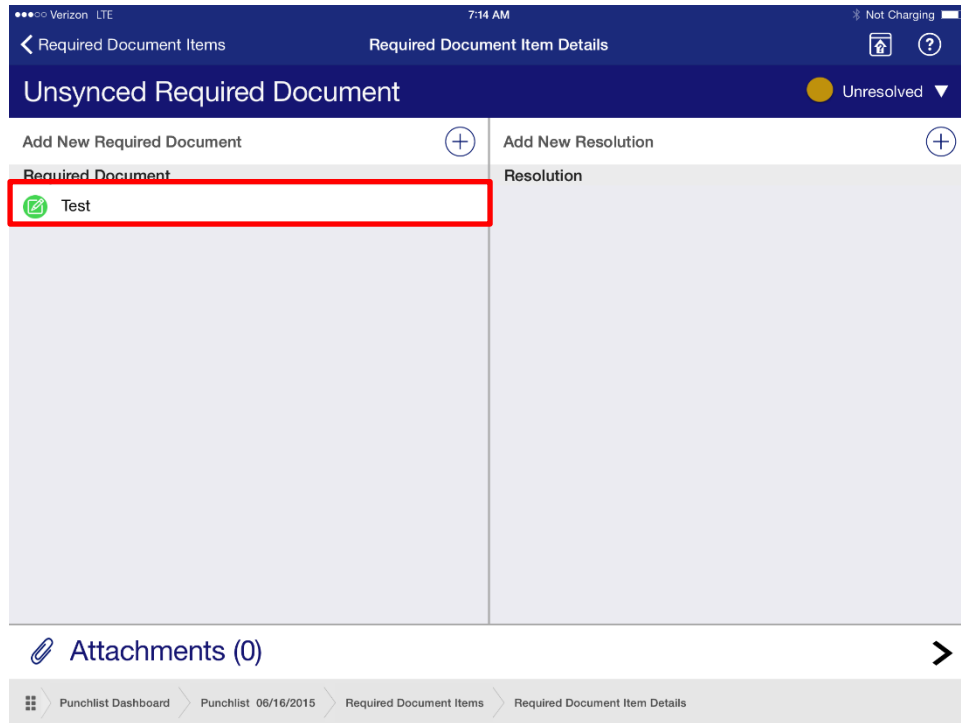On the text window that displays, enter the discrepancy. After you are finished, select Done.

The new discrepancy will appear on the Required Document Details screen.

Editing a Discrepancy

If a discrepancy has an editable icon you can edit it by tapping on the respective row.

On the text window that is displayed, adjust the entry as necessary and click Done to save the change.

Deleting a Discrepancy
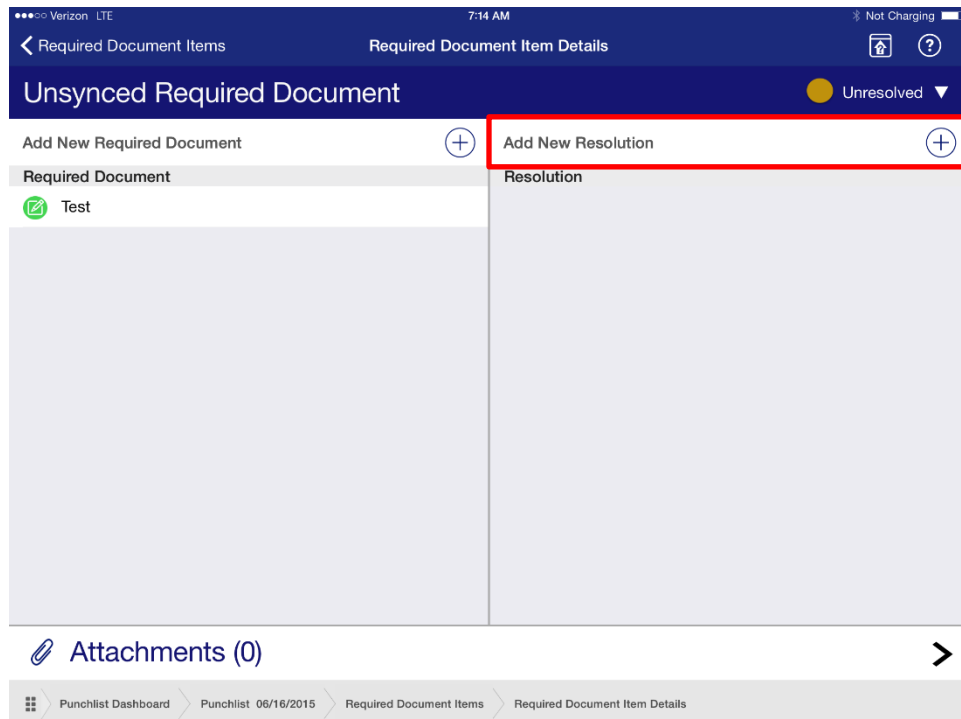
To delete a Discrepancy, swipe the row from right to left to reveal the delete button. Tap the delete button to delete the discrepancy.
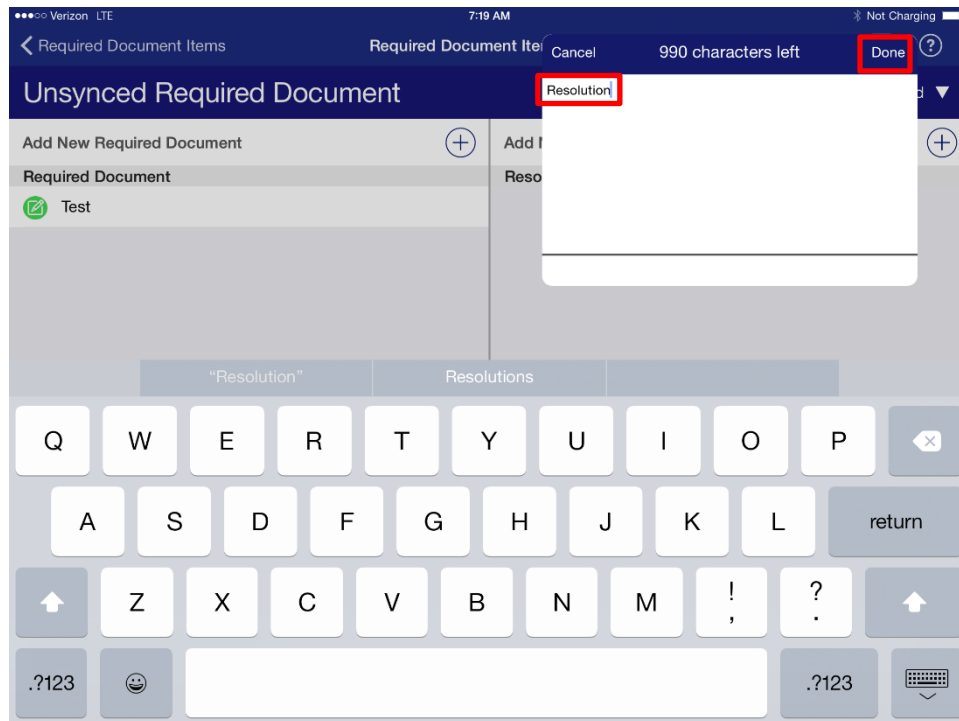

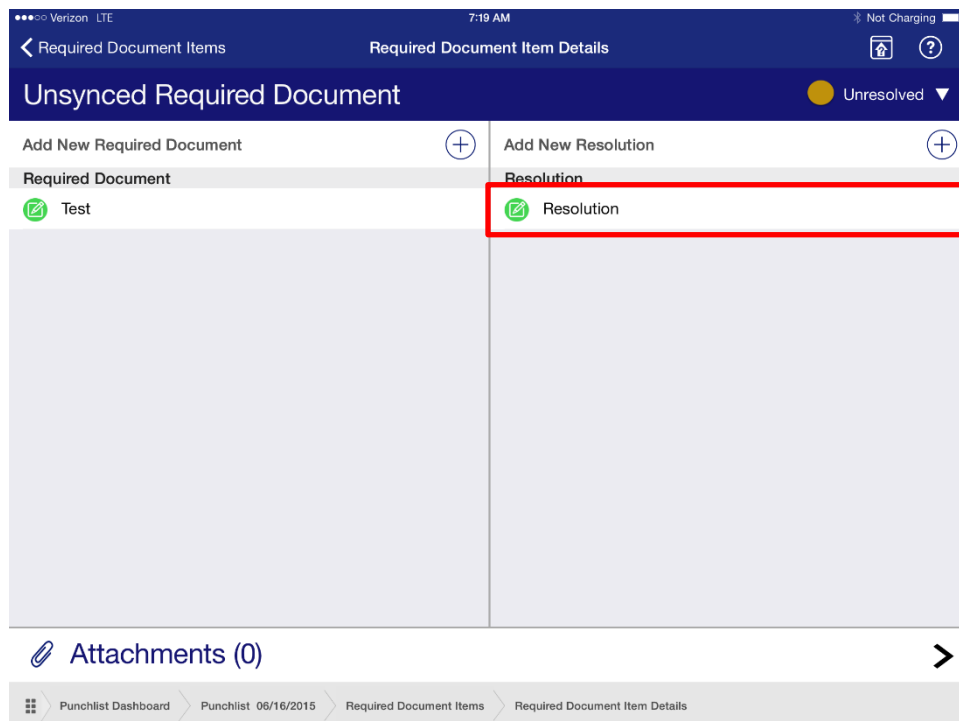## Adding a new Resolution

To add a new resolution, tap on the Add New Resolution row.

On the text window that displays, enter the resolution description and tap Done.

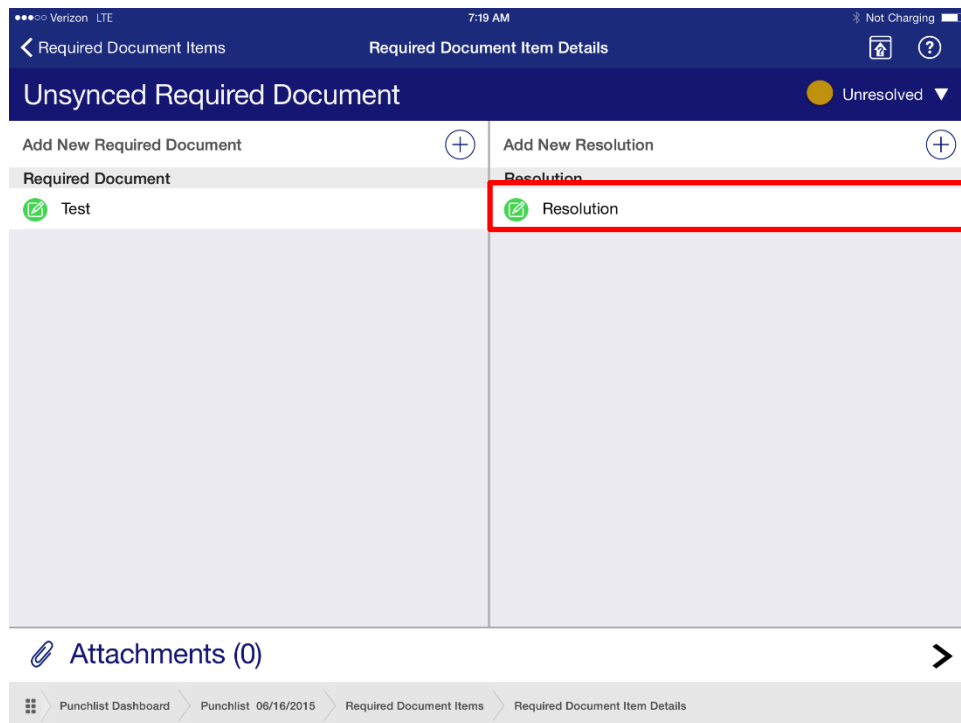The new resolution will display on the Required Document Item Details list.

Editing a Resolution

From the Required Document Details screen, tap on the resolution to be edited. Remember, the resolution must be displaying the editable icon. If the resolution has already been synced to ECMS, you will not be able to change it.
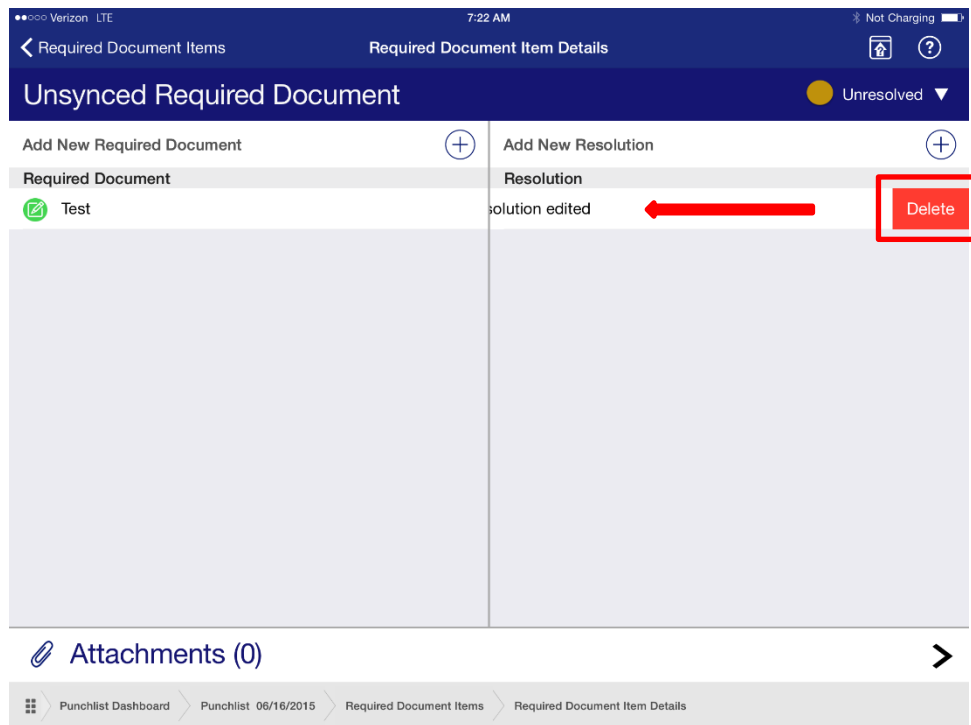
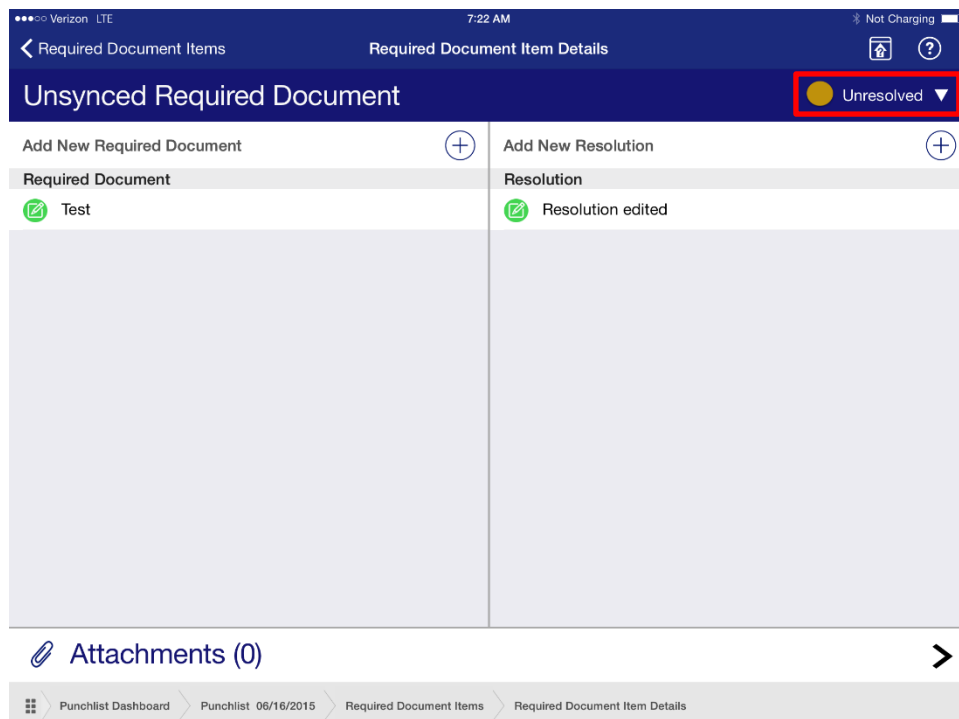On the test window that displays, adjust the resolution as necessary.
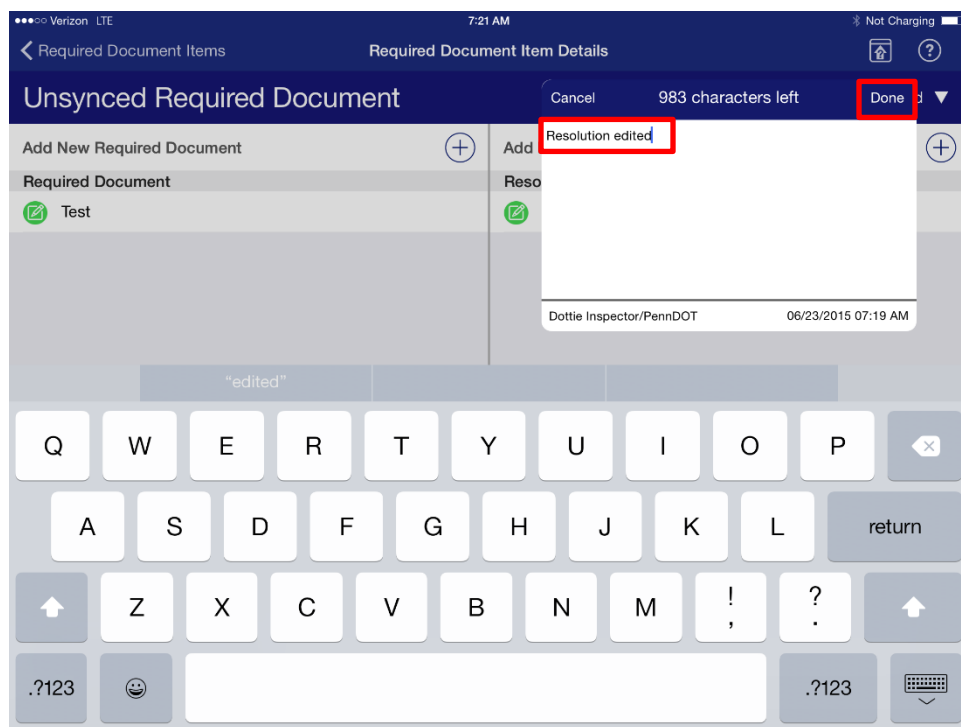
Deleting a Resolution

To delete a Resolution, swipe the row from right to left to reveal the delete button. Tap the delete button to delete the discrepancy.
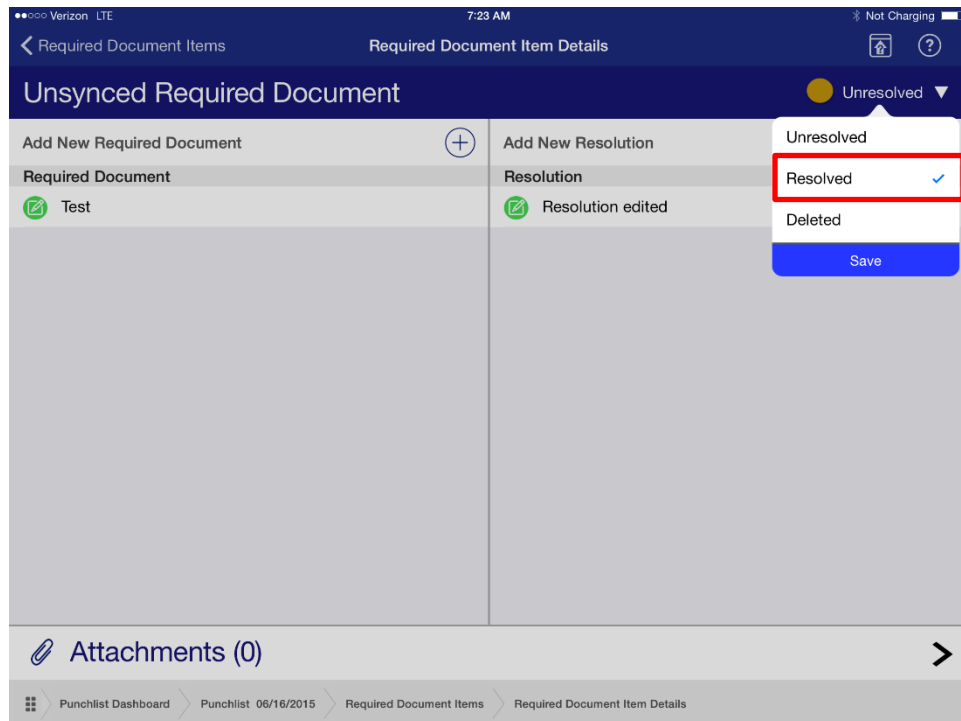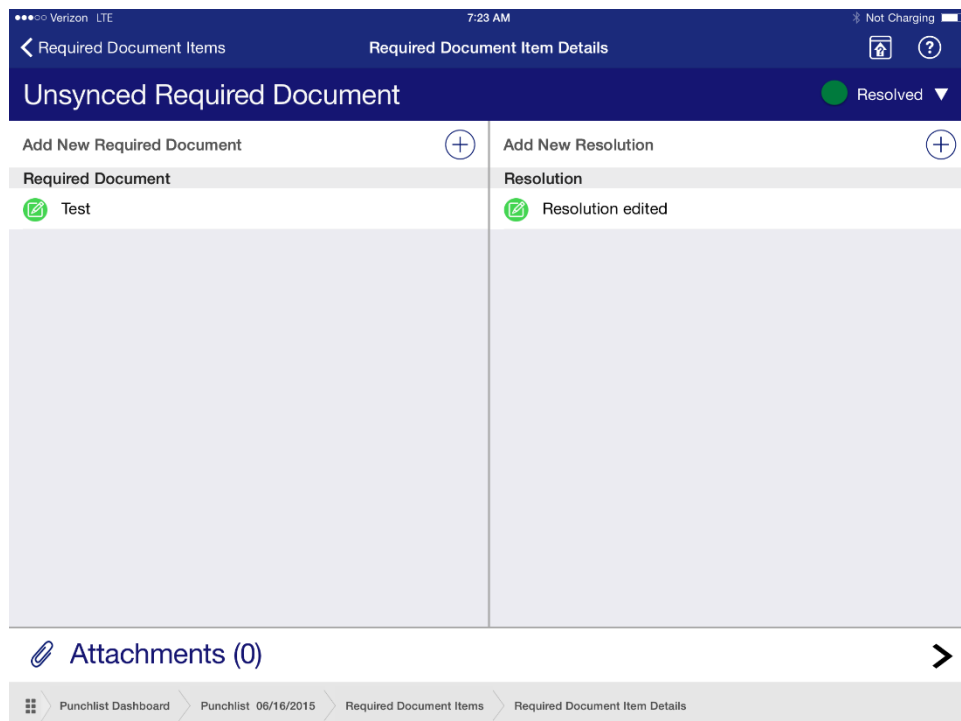

Changing Required Document Item Status

To change a physical work item's status, tap on the status in the upper right corner.

On the dropdown that displays, select the appropriate status and tap Save.

After selection, the updated status will be displayed.

Please Note: If you are attempting to change a Required Documents to Resolved you must first enter a resolution. Otherwise, you will get the error message seen below.

Attachments

Accessing Attachments

Attachments are available to both Physical Work Items and Required Document Items at the details level. To access attachments, navigate to the appropriate details screen and tap on the Attachments row.

Please Note: You must add at least one discrepancy in order to access "Attachments" screen.
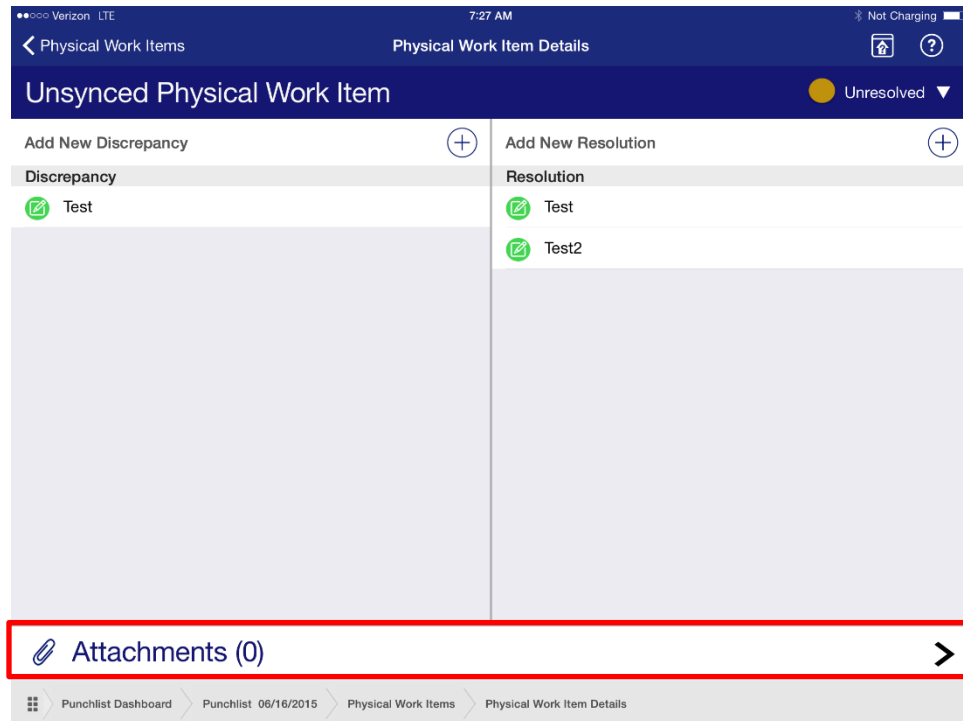
Attach a file

To attach a file, tap the "add new" icon in the upper right corner. Select "Attach a File" from the menu that displays.
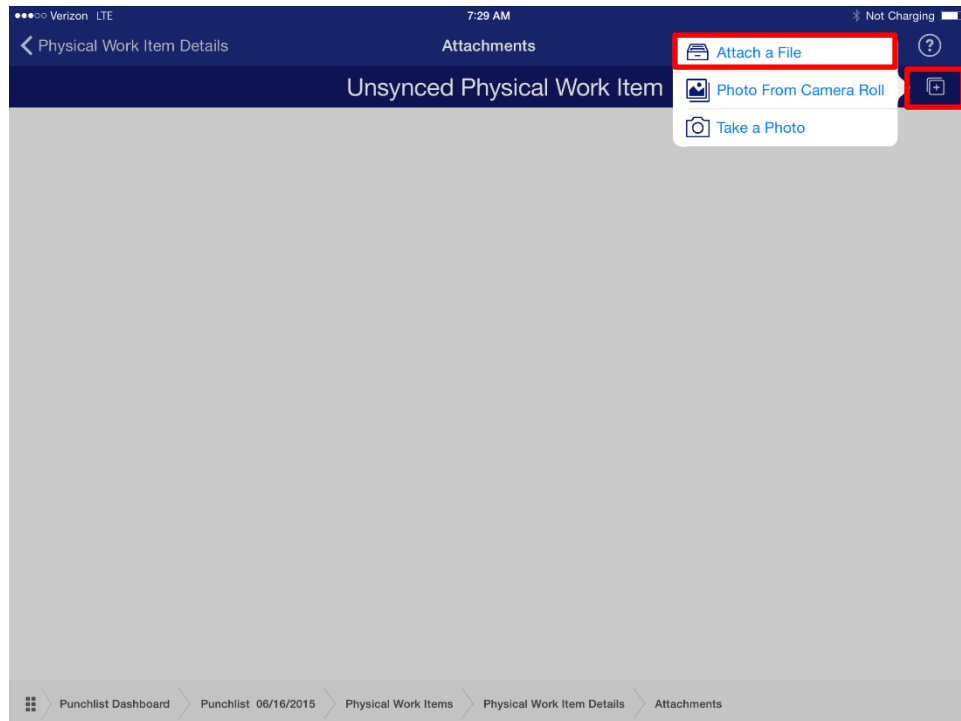
Available imported documents will display. To select one, tap it and it will display with a blue checkmark. To unselect, tap again and the checkmark will be removed. When you have selected all documents to be attached, tap Done.

The file will be imported into the Punchlist app.
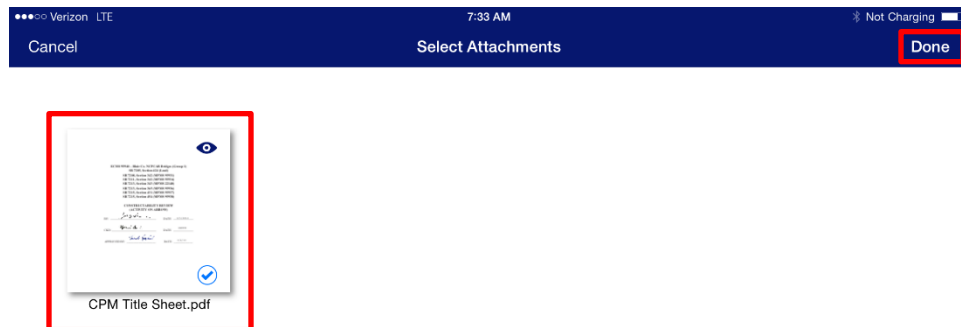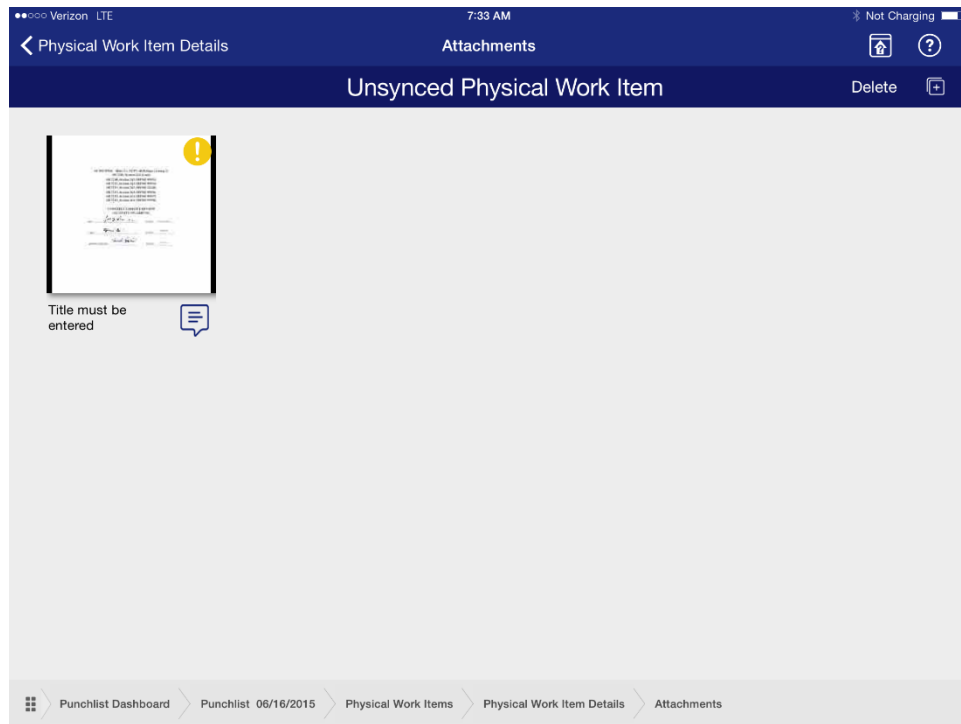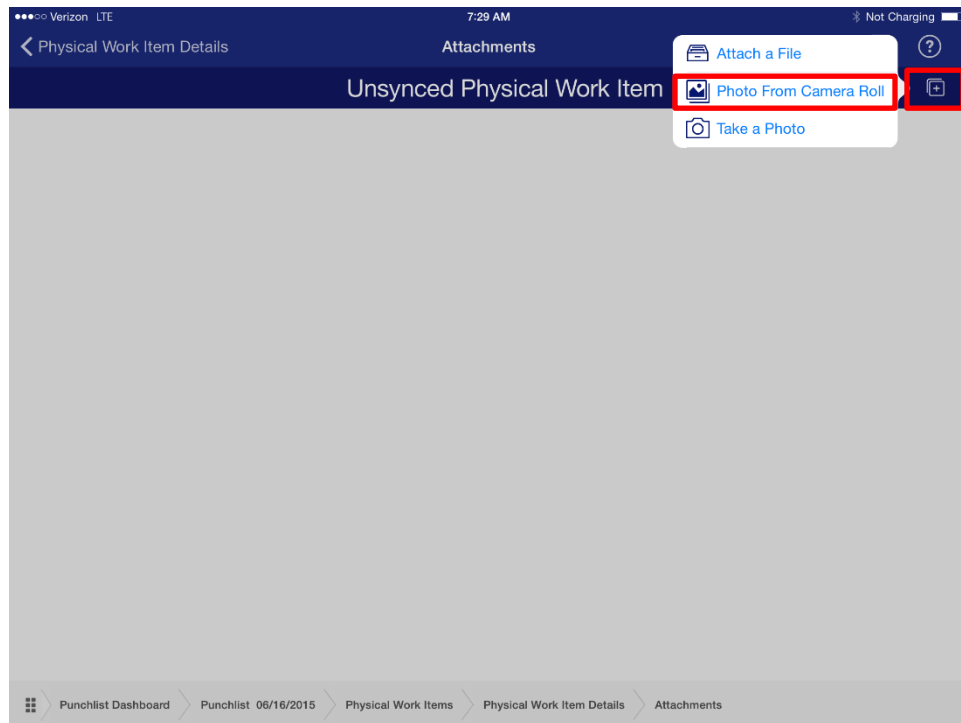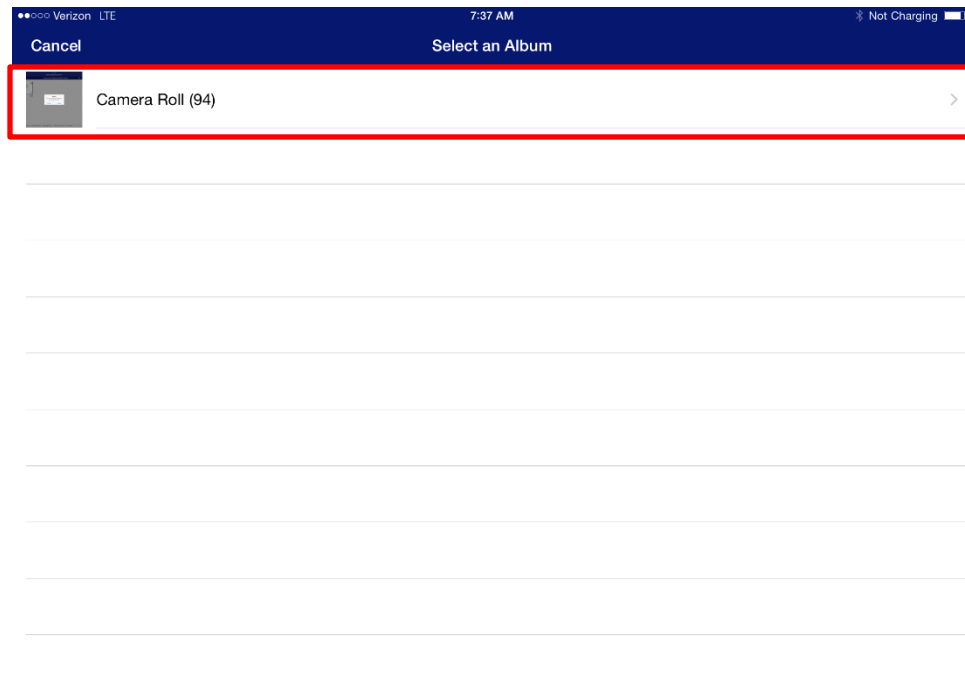

Attach a Photo

To attach a photo, tap the "add new" icon in the upper right corner. Select "Photo from Camera Roll" from the menu that displays.

Select the album that contains the photo to be attached.

Tap the photo(s) to be attached. A blue, circled checkmark will display to indicate a photo has been selected. If you tap an incorrect photo by accident, tap it again to deselect it. Once all photos to be attached are selected, tap Done in the upper right corner.
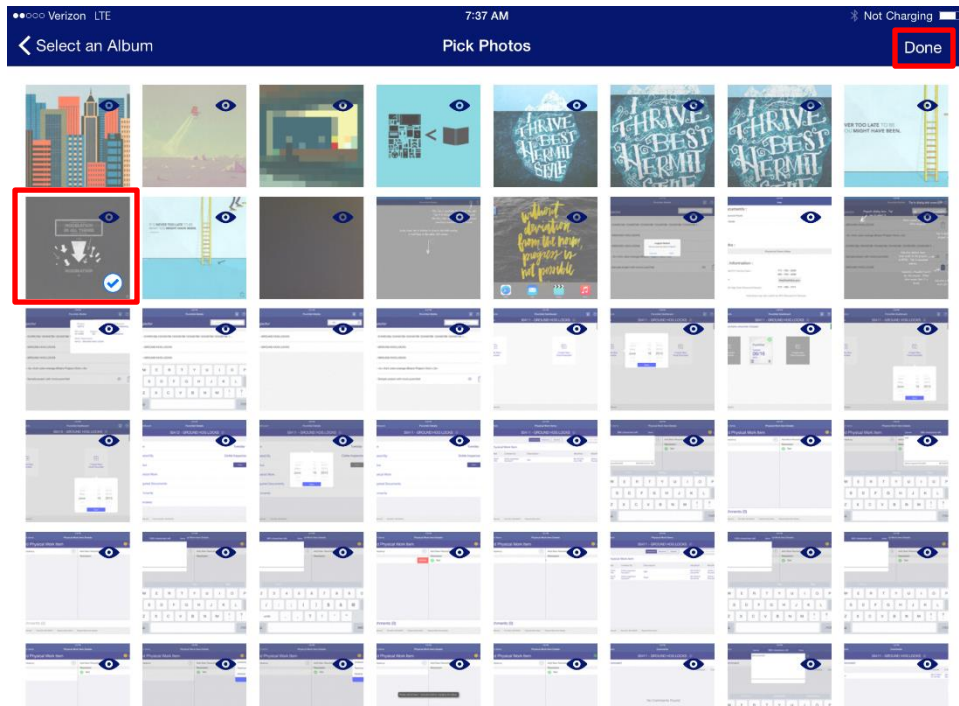
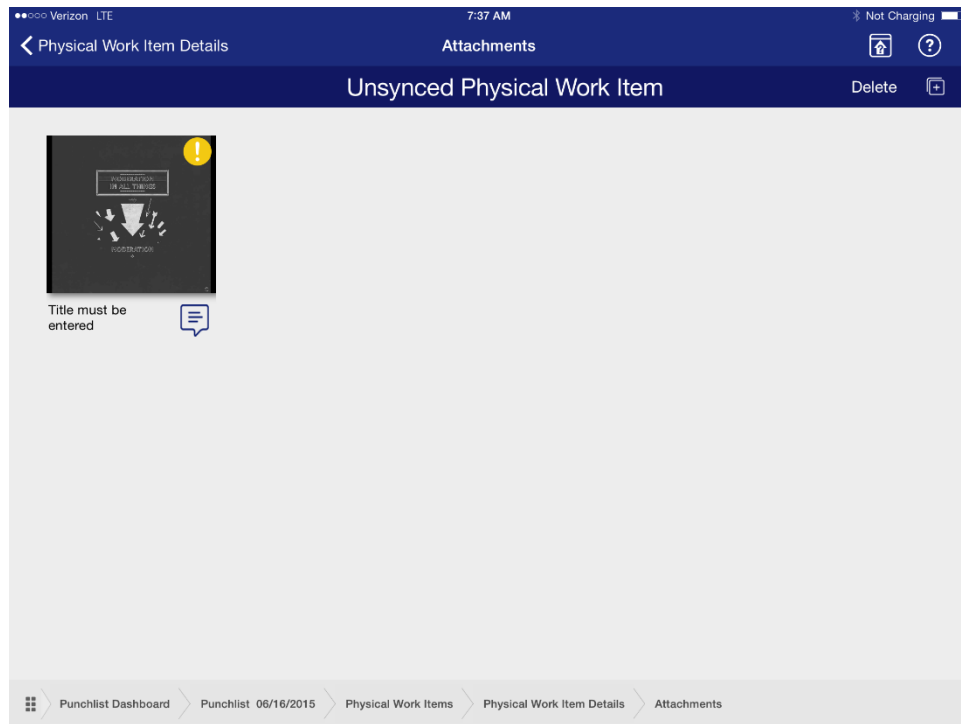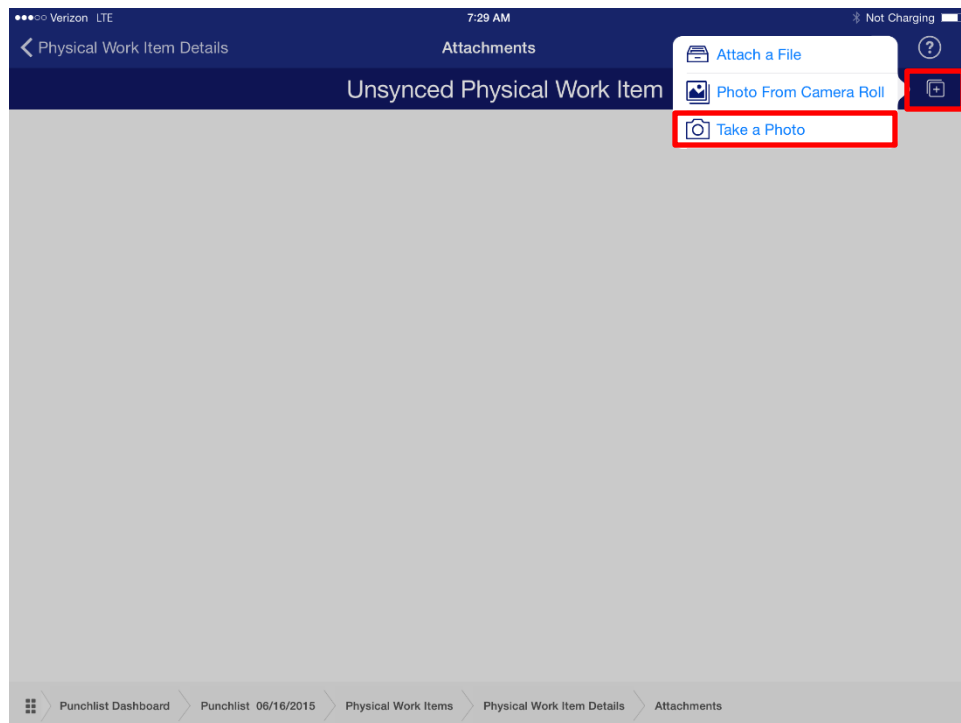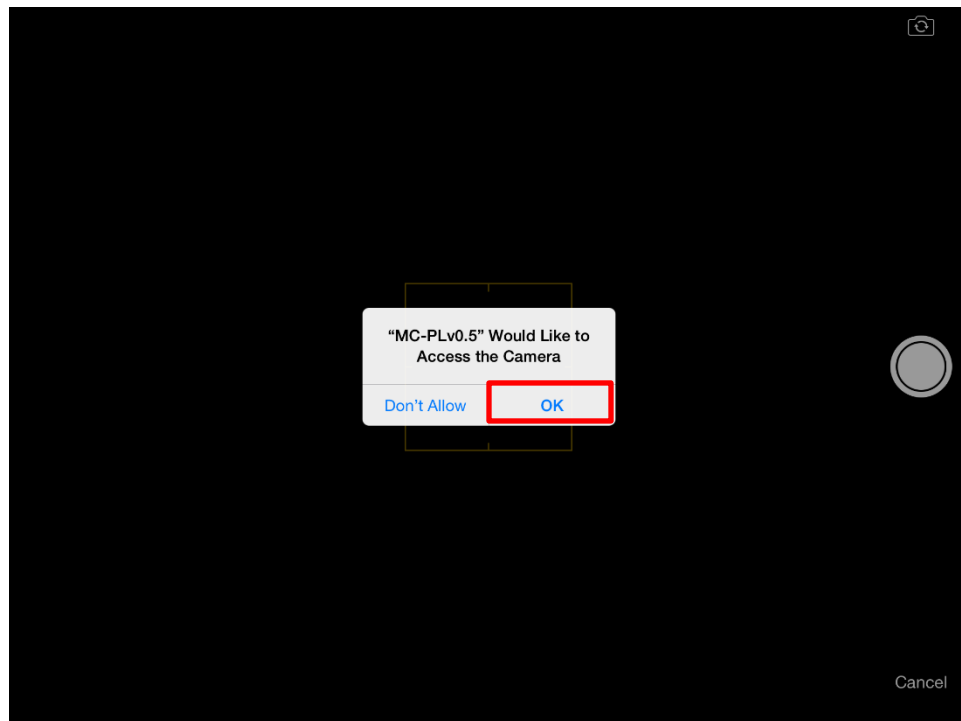The photo(s) will be imported into the Punchlist app.
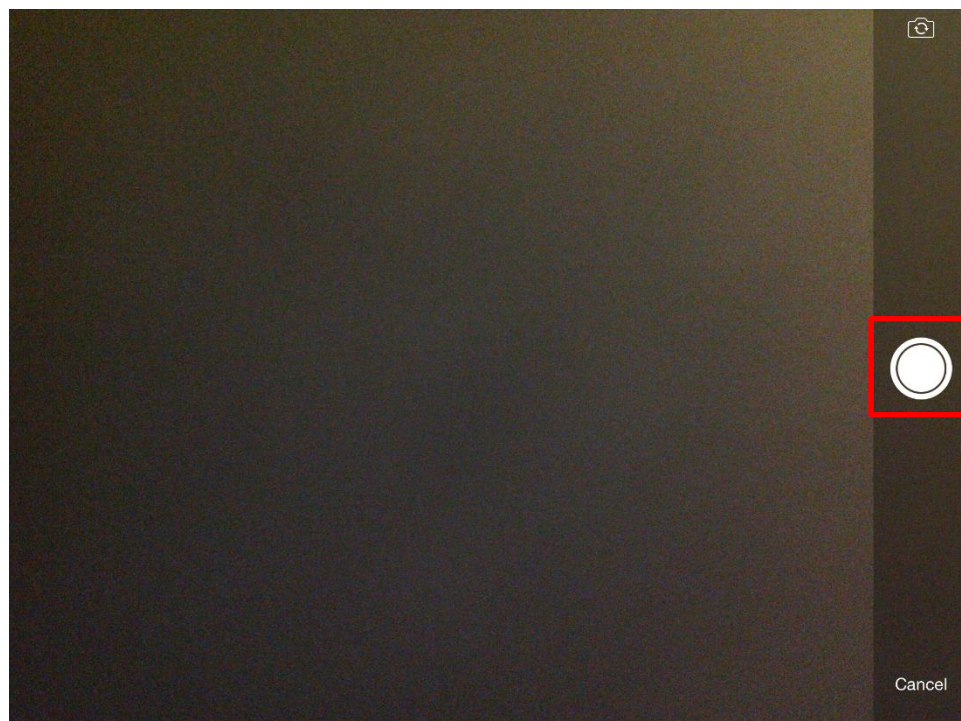

Take a Photo

To attach a newly taken photo, tap the "add new" icon in the upper right corner. Select "Take a Photo" from the menu that displays.
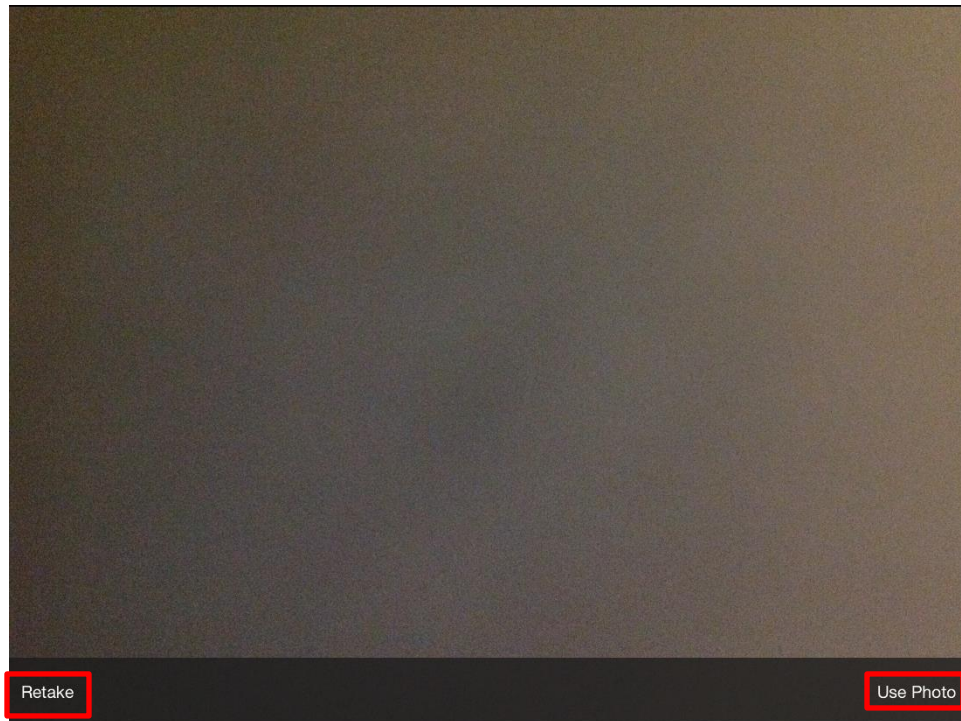
The camera will launch. If a message appears asking to grant access to the camera, click OK.
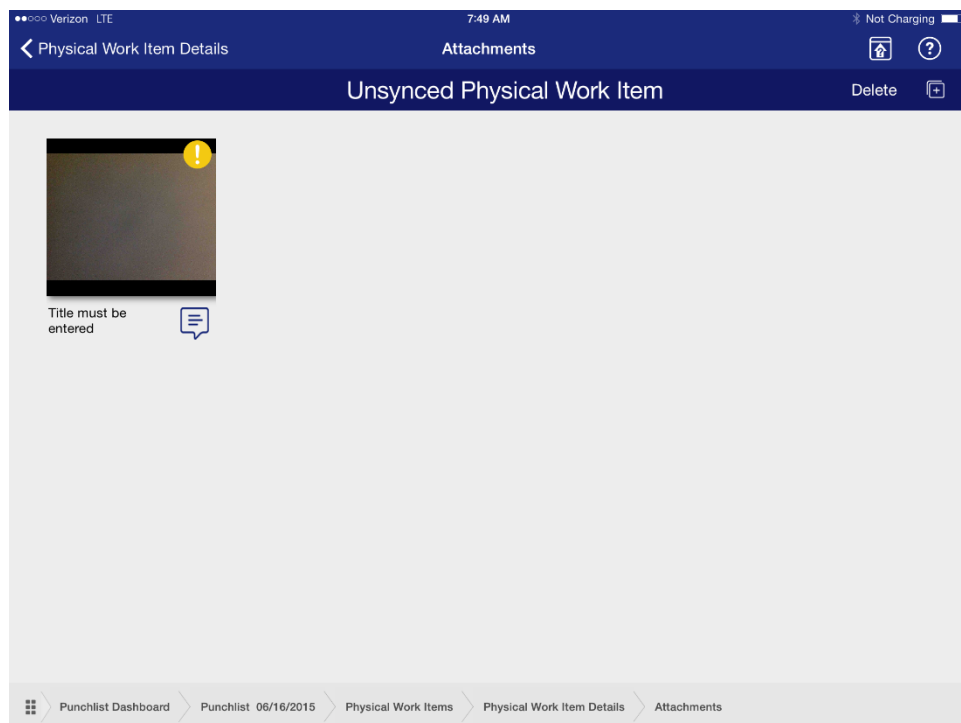

Tap the shutter button to snap a new photo.

A new photo will be captured and options asking whether you want to retake or use the photo appear at the bottom of the screen. If the picture did not turn out well, tap Retake to capture a new image. If it looks good, tap Use Photo.
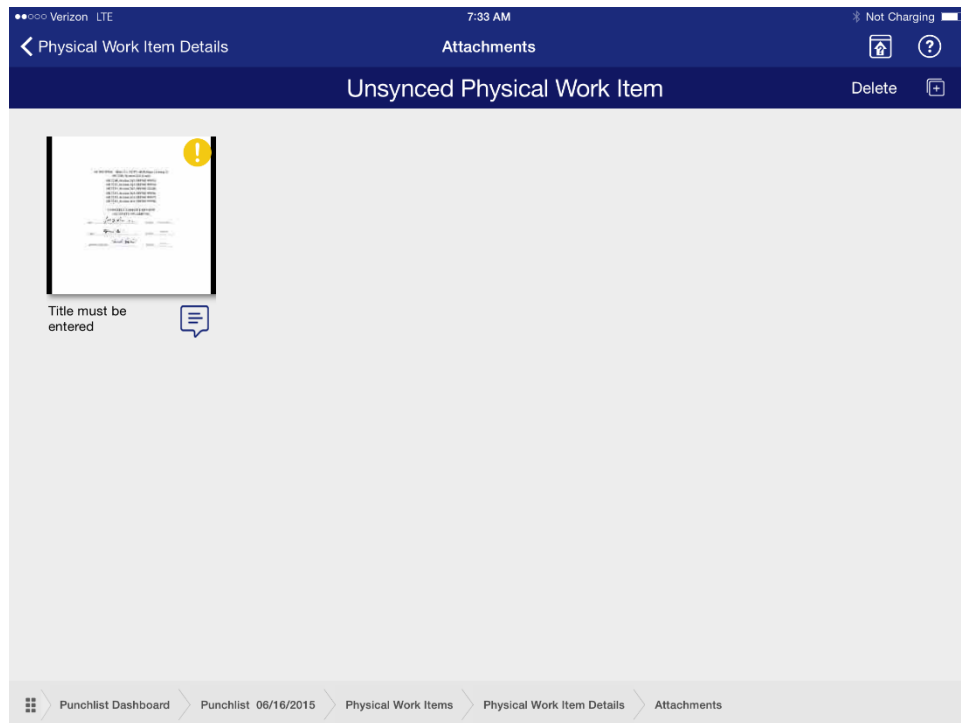

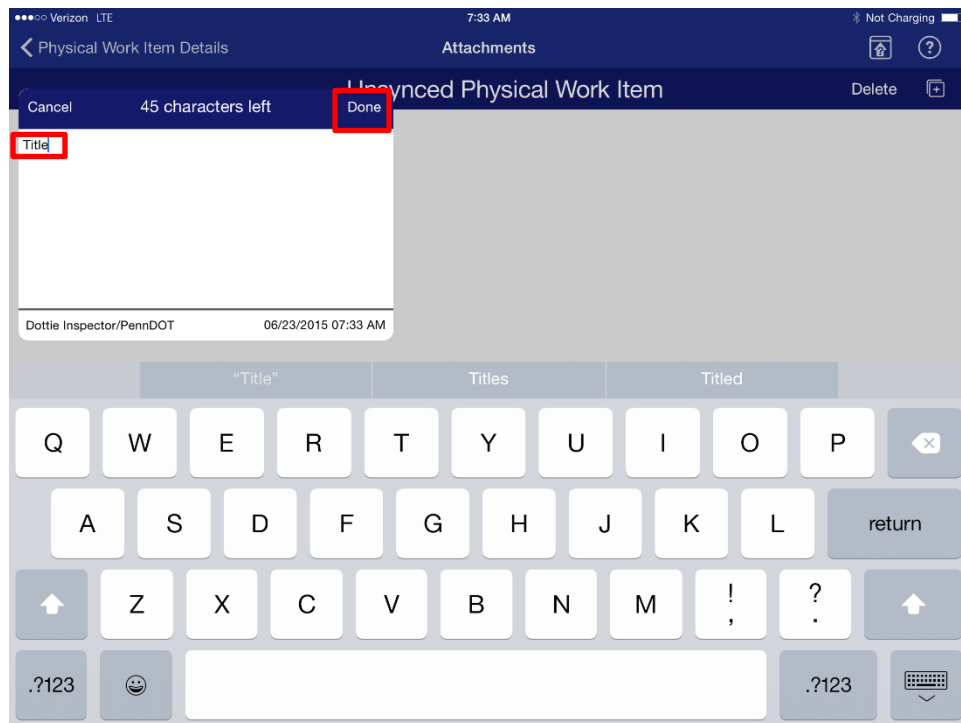After selecting Use Photo, the image will be imported into the Punchlist app.

Attachment Title
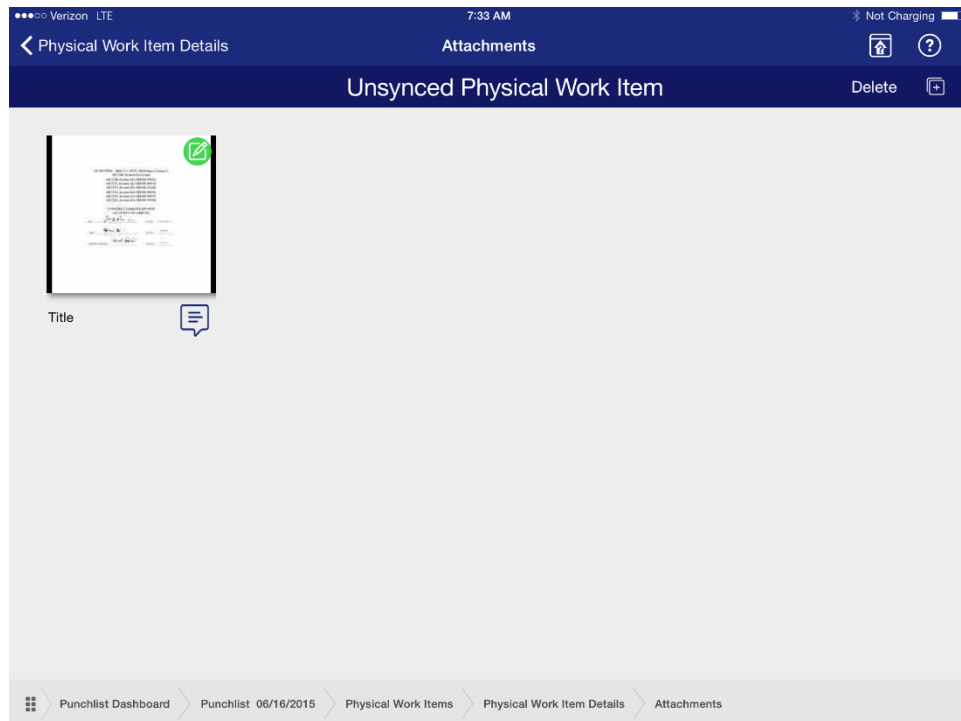
Every attachment in the Punchlist app must have a title. To give an attached item a title, tap on the "Title must be entered" verbiage below the thumbnail image.

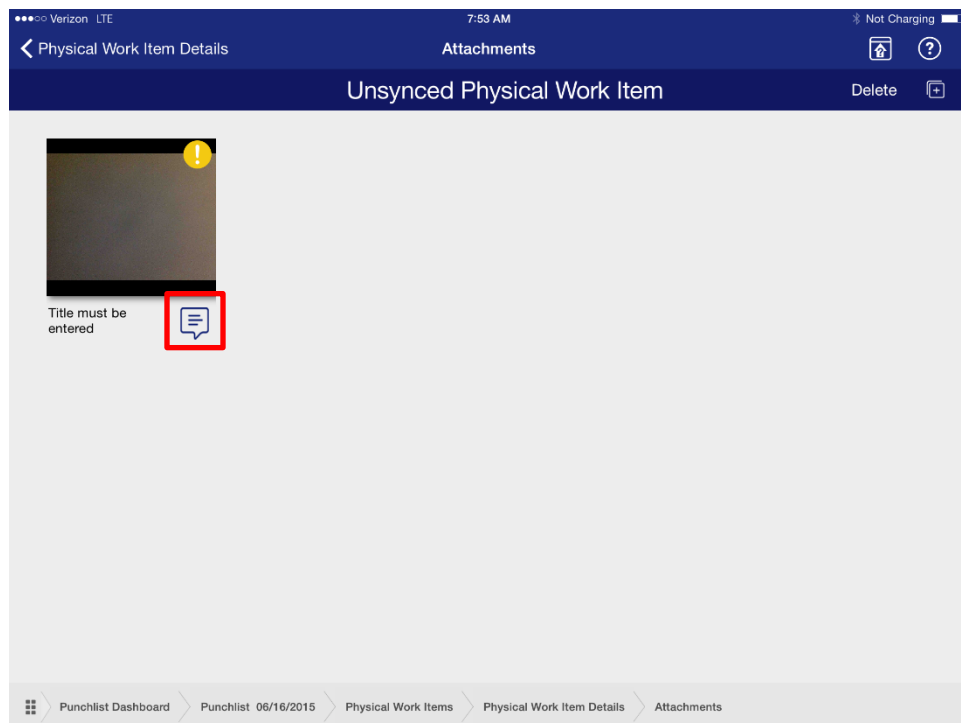On the text window that displays, give the attachment a title and click Done.

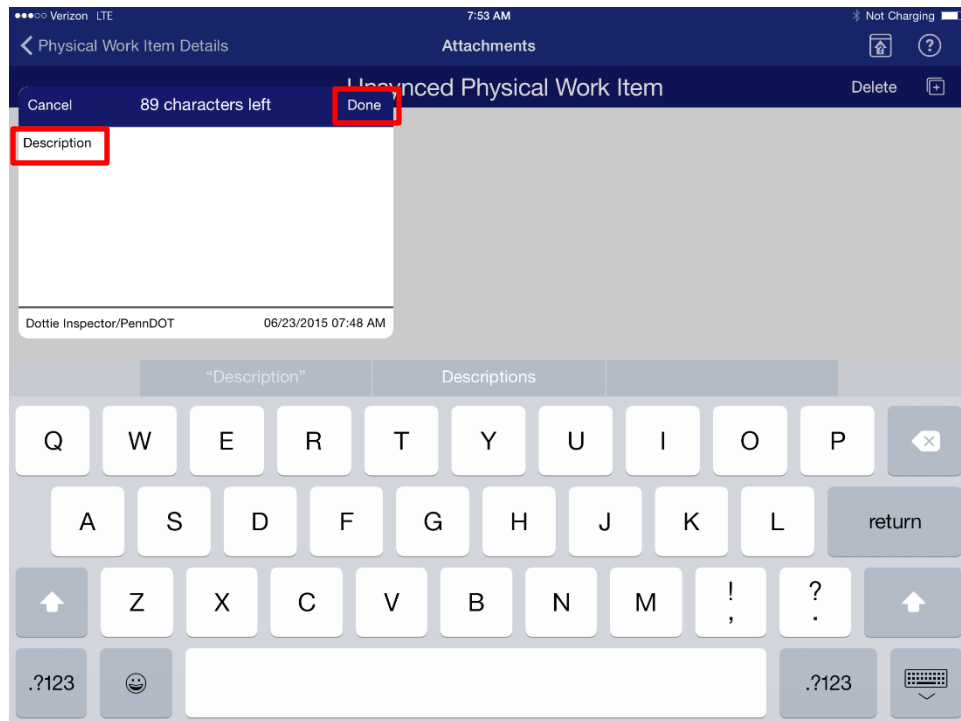The title will appear below the attachment.
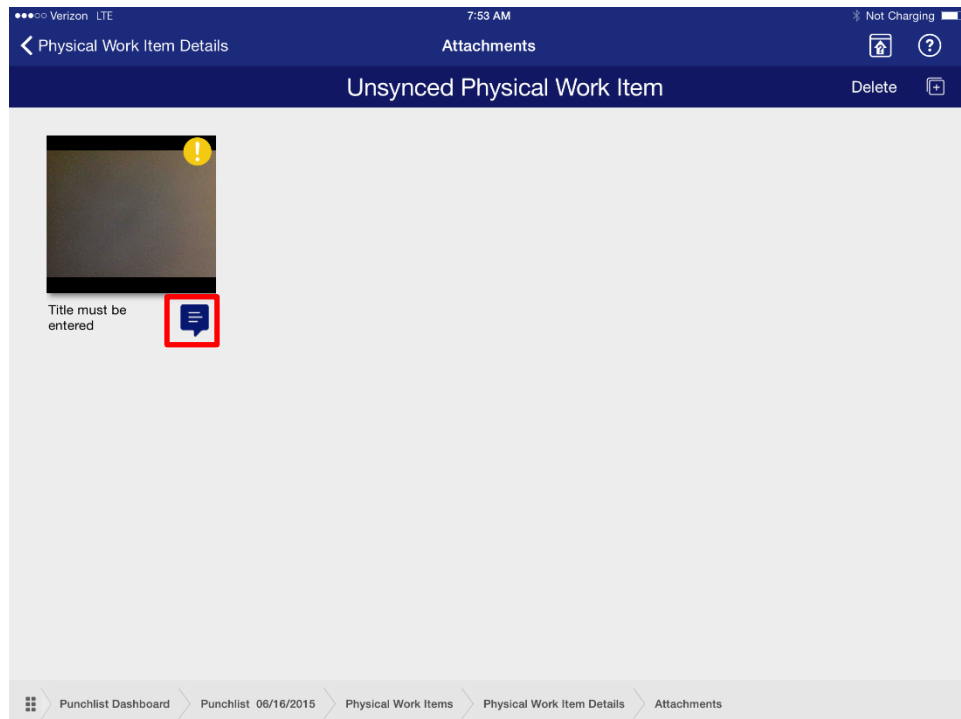

Attachment Description

An attachment description is not required, but can be provided by tapping on the description icon below the attachment.

On the text window that displays, give the attachment a description and click Done.
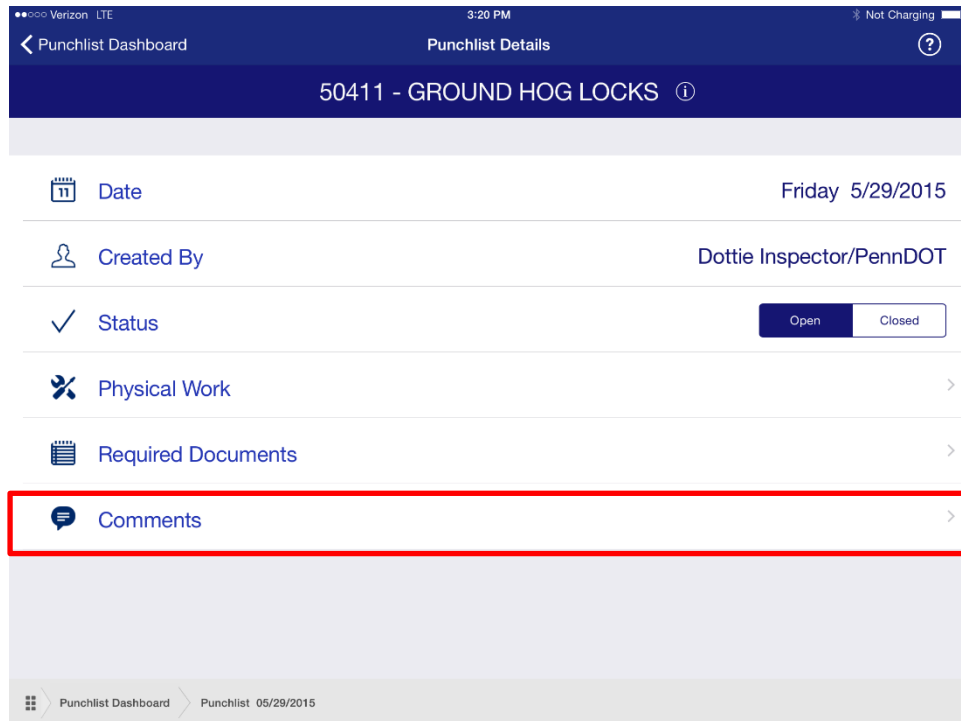

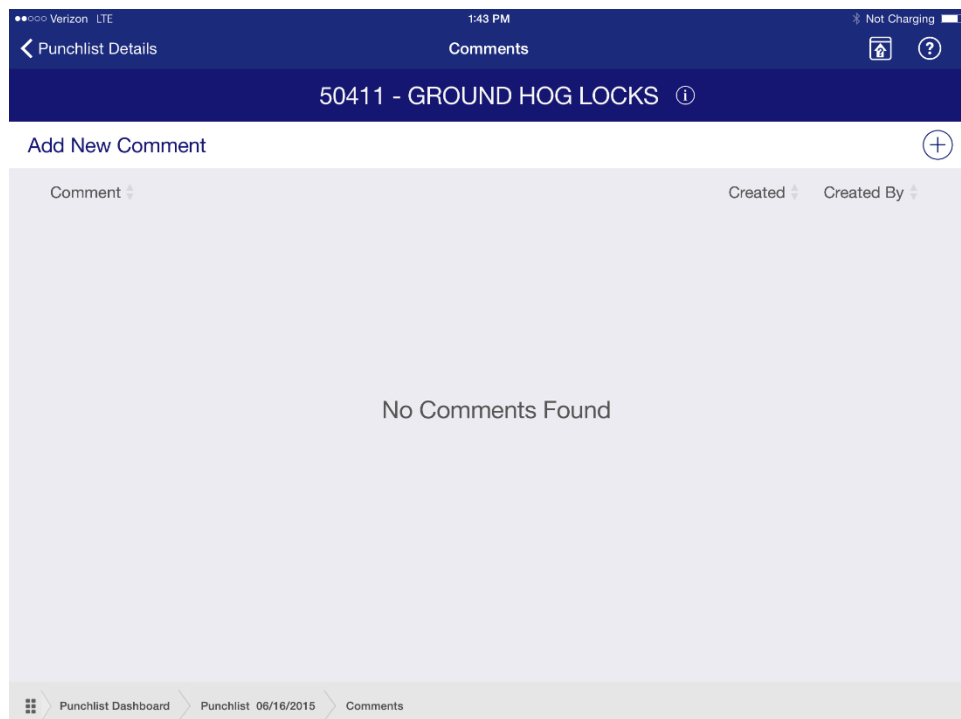The description icon will display filled to indicate that a description has been entered.

Comments

Accessing Comments
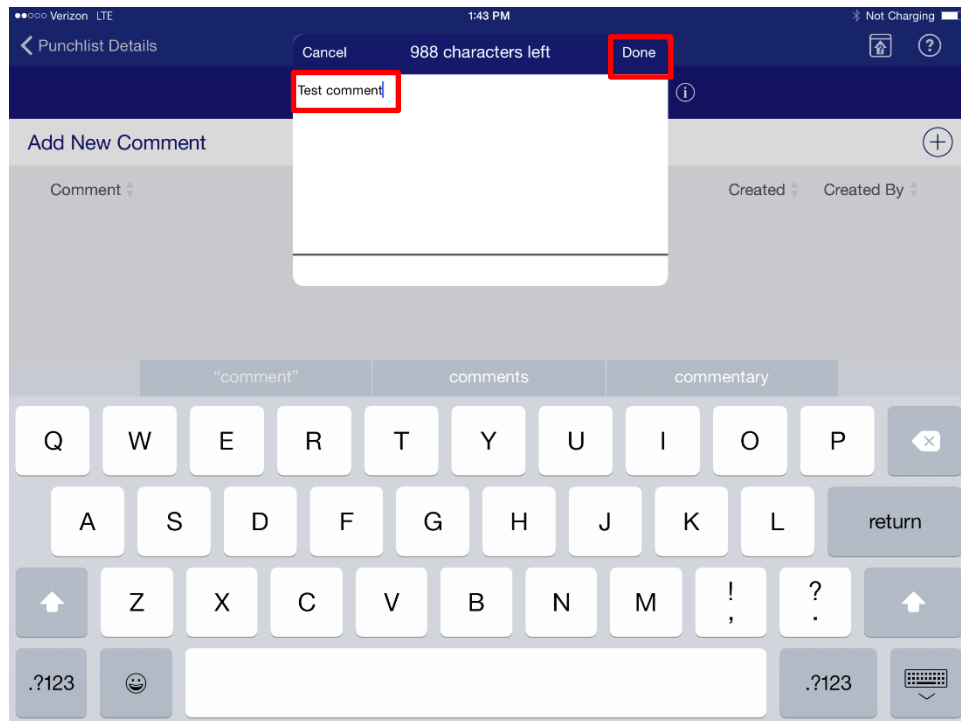
To access Comments, tap anywhere on the Comments row.

Adding a new Comment

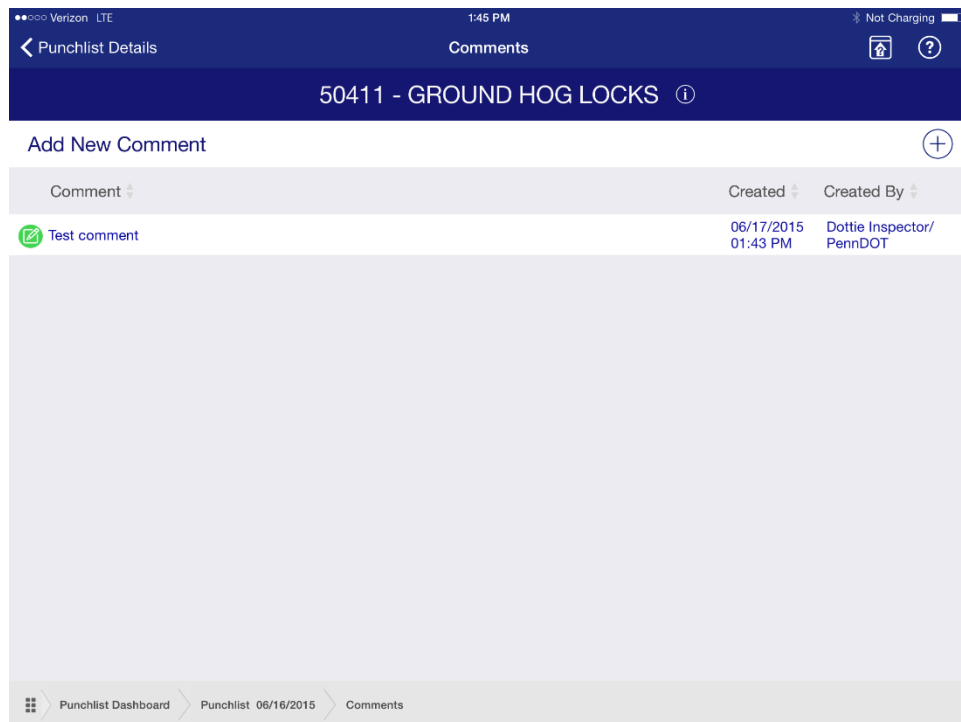On the Comments screen, tap on the Add New Comment row.

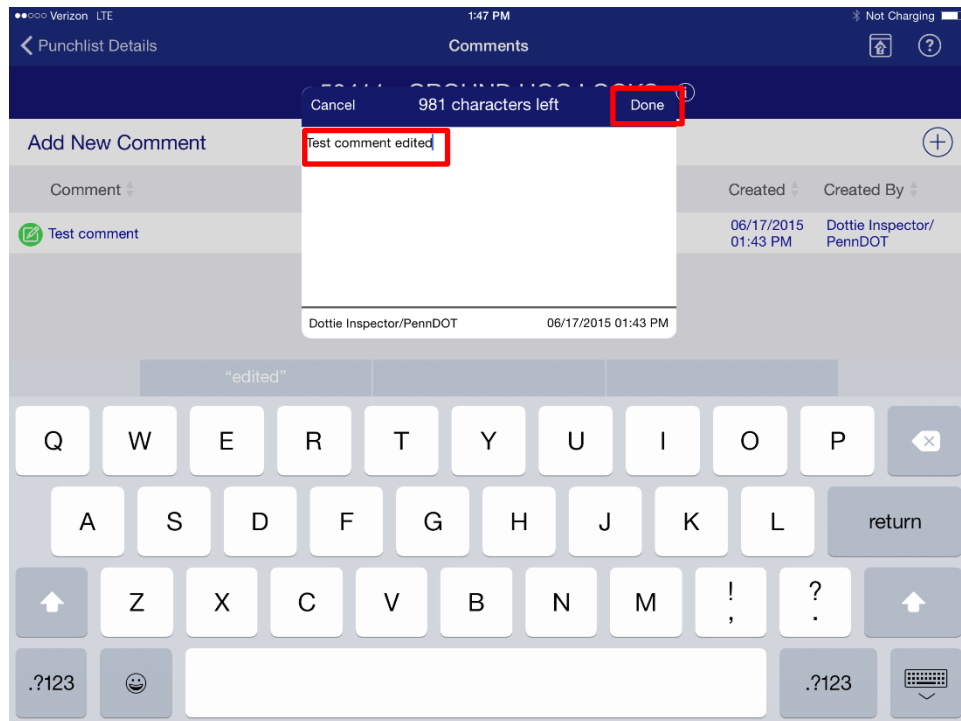On the text window that displays, enter your comment. When complete, tap Done.

Editing a comment

To edit a comment if the editable icon is displayed tap the comment anywhere on its row.
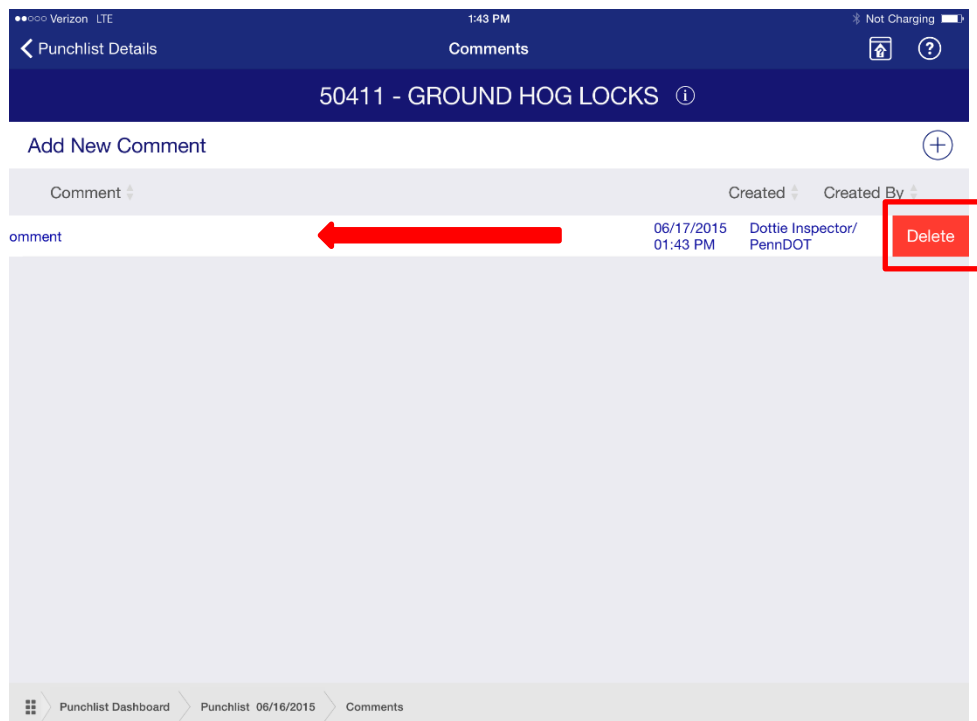
On the text window that displays, edit the comment as appropriate and tap Done.

Deleting a Comment

To delete a comment, swipe from right to left on the comment row to display the delete button. Tap the delete button to delete the comment.
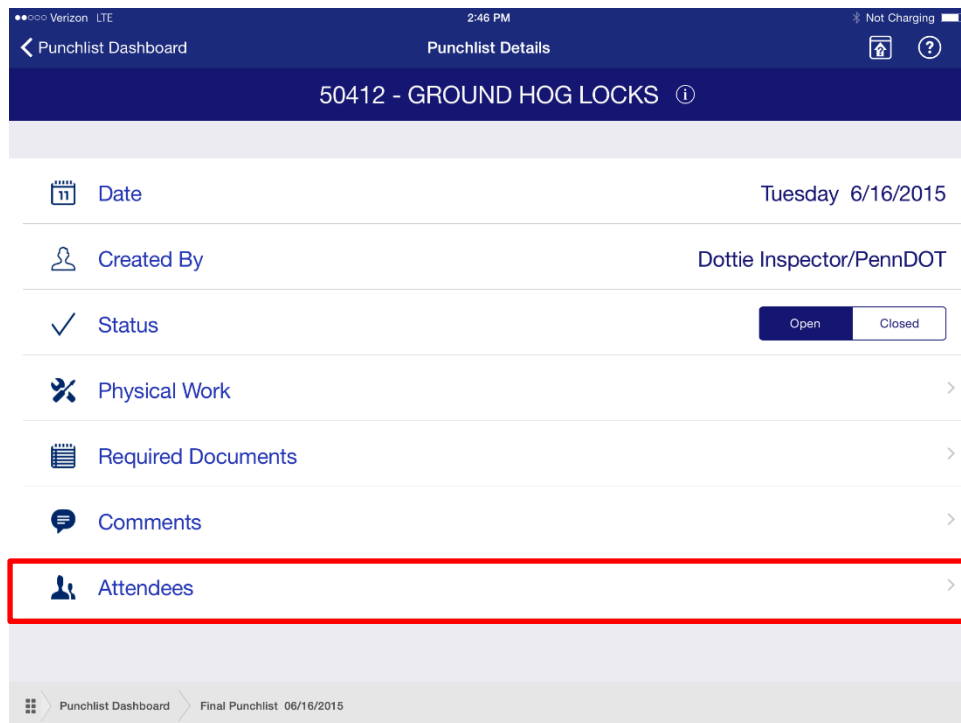
Attendees

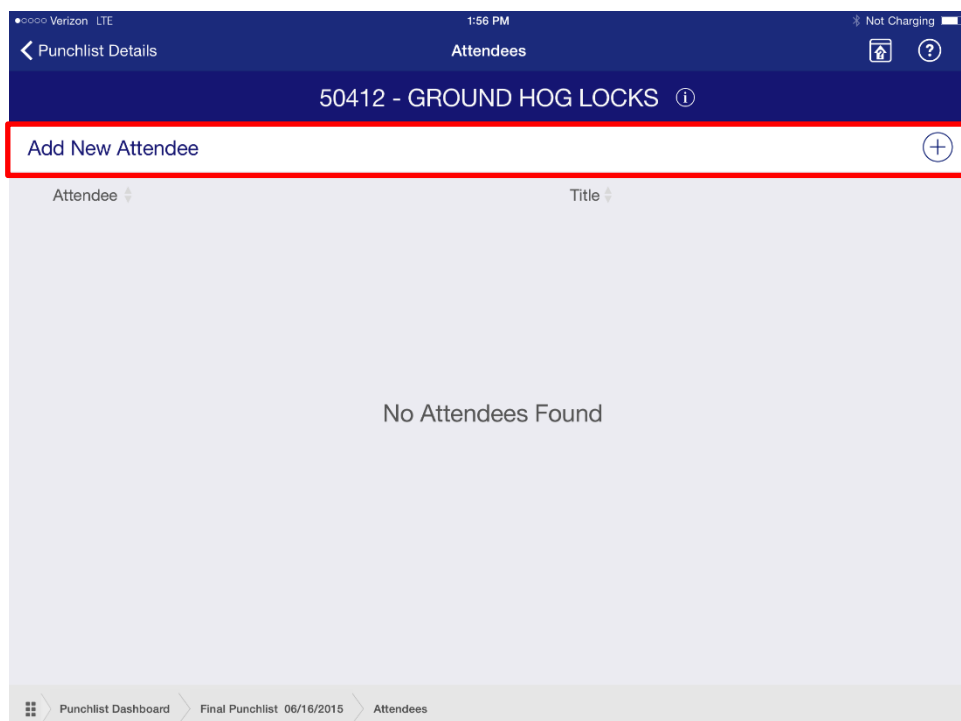For Final Punchlists only, a section for Attendees is available.

Accessing Attendees

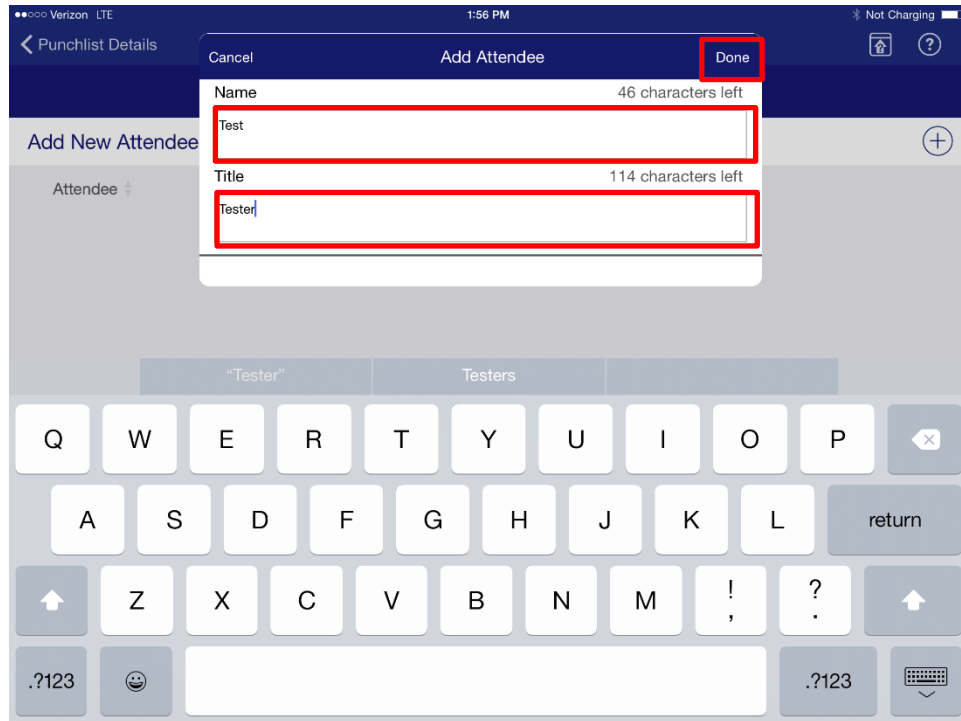To access Attendees, tap anywhere on the Attendees row.

Adding a new Attendee

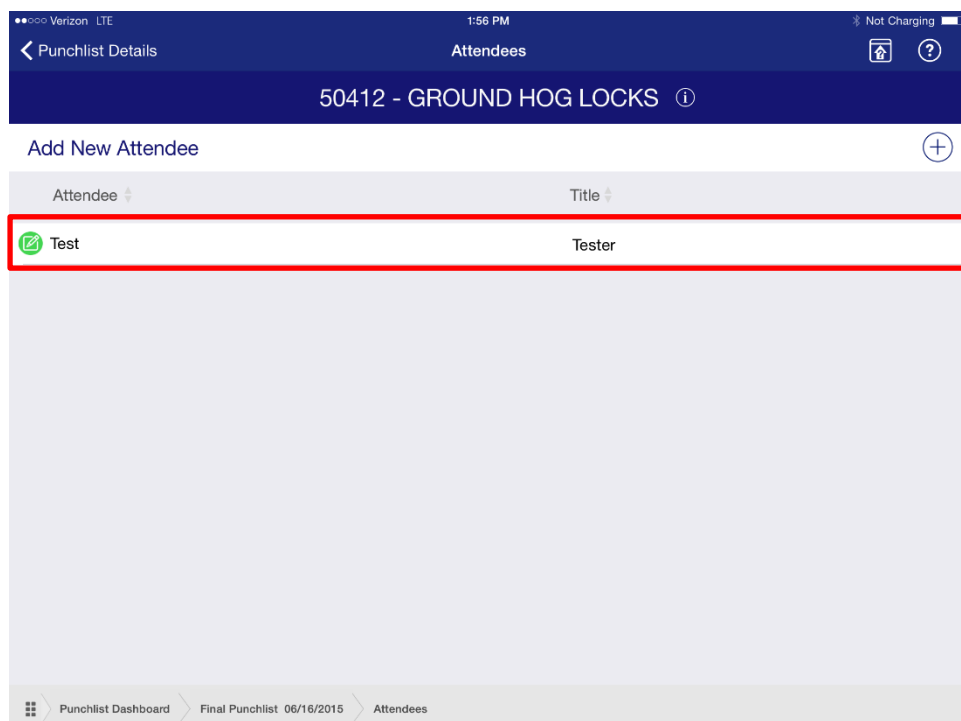On the Attendees screen, tap on the Add New Attendee row.

On the text window that displays, enter the attendee name (required) and title (if applicable). When complete, tap Done.
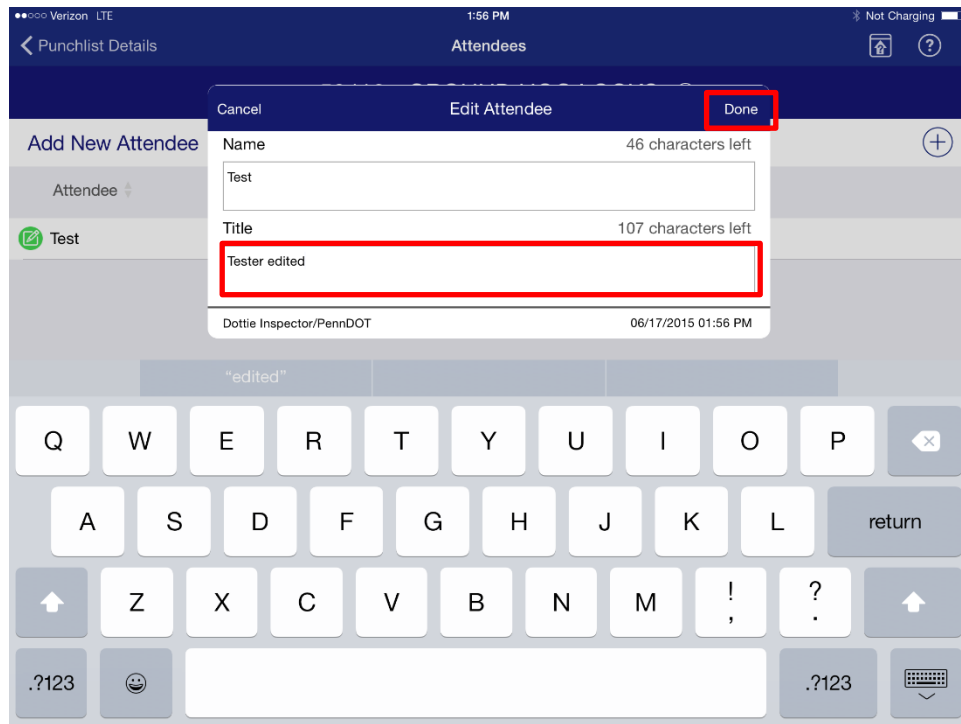

Editing an Attendee

To edit an attendee if the editable icon is displayed tap the attendee anywhere on its row.

On the text window that displays, edit the attendee as appropriate and tap Done.

Deleting an Attendee

To delete an attendee, swipe from right to left on the attendee row to display the delete button. Tap the delete button to delete the attendee.